

**University of Southampton**

**“Marketing, Management and Schools:  
A Study of a Developing Marketing Culture in  
Secondary Schools”**

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**April 1995**

**Marketing, Management and Schools:  
A Study of a Developing Marketing  
Culture in Secondary Schools**

***For Ros, James and Rachel***

***and***

***For My Parents***

**UNIVERSITY OF SOUTHAMPTON**

**ABSTRACT**

**FACULTY OF EDUCATIONAL STUDIES**

**EDUCATION**

**Doctor of Philosophy**

**MARKETING, MANAGEMENT AND SCHOOLS: A STUDY OF A  
DEVELOPING MARKETING CULTURE IN SECONDARY SCHOOLS**

**by Nicholas Hedley Foskett**

This is a study of the 'supply side' of the secondary schools market place which has operated in England and Wales since the 1988 Education Reform Act. It examines three key issues - the understanding that teachers and education managers have of the concept of marketing; the organisational and operational responses of schools to the demands of marketing; and the ways in which the culture of schools is changing in response to the pressures of marketisation.

The study uses a multi-site case study methodology together with a modified Delphi survey. This suggests, firstly, that there is a spectrum of understanding of marketing, from an undifferentiated to a differentiated perspective, with schools and individuals experiencing spectral drift across this range. This enables a model of 'marketing' in schools to be developed, which incorporates the key ideas of communications, recruitment, quality and responsiveness.

Secondly, schools demonstrate a reactive, non-rational approach to planning for marketing, with no overt development of marketing strategies, limited use of marketing research or evaluation techniques, and little integration of marketing into existing school development planning. Consideration of school and 'consumer' perspectives enables, however, a number of effective promotional strategies to be identified which use traditional school communication approaches.

Thirdly, an Index of Marketing Cultural Development can be used to describe the adoption of a marketing culture in schools. Its use shows that most of the study schools have only weak development of a marketing culture, despite a generally positive view of marketing by teachers and education managers. It suggests a linkage between external pressures on schools, from both policy and the market, internal school attitudes to a market model, and the cultural changes in schools. A four-fold typology of school response to marketisation is developed from this analysis.

The study concludes by developing an input-process-output model of the marketisation of schools.

## **Acknowledgements**

I would like to acknowledge the support, guidance and encouragement of Peter Kelly. His response to ideas and his ability to stimulate the production of clarity where none or little existed provided enormous support throughout this research journey.

My family have also provided the encouragement and incentive to start, continue and finish this work. Without their support, and the space they were able to provide, this thesis would never have been produced.

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# **CHAPTER 1**

**Introduction - Schools in the Market Place**

# Chapter 1

## Introduction - Schools in the Market Place

### 1.1 Markets, Marketing and Schools

Even a decade ago the concepts of the market and of marketing were unfamiliar within most sectors of education within the United Kingdom, and were terra incognita to almost all schools in the compulsory phases of state education. Centralised planning by local education authorities (LEAs) and by the government's Department of Education and Science (DES - now the DfE (Department for Education)) allocated resources and pupils to schools, and the existence of firmly-bounded catchment areas, modifiable only by LEA edict, matched intake to space provision and resource allocation. The 1980s and 1990s has seen a radical challenge to this perspective, however. From its initial appearance in the discourse of public sector higher education in the 1970s, where competition with the universities prompted a pro-active approach to recruitment, marketing emerged in the further education environment (Davies and Scribbins (1985); Megson and Baber (1986); Theodossin (1989)), in the traditional universities (Keen and Greenall (1987); Keen and Higgins (1990); Whitby (1992); Foskett (1992c)), and within the compulsory phase of education in England and Wales (i.e for 5-16 year olds). The operation of schools in a competitive environment has become an important facet of educational management, and.....

“(the) management of external relations has become a central challenge for those working in schools and colleges. (...) Issues relating to marketing and image are to be found on the agendas of governors’ meetings and senior management team (SMT ) meetings with a frequency that would have been unthinkable (in the past)”

(Foskett (1992a): 3)

The need to compete for pupils within the 5-16 age range has arisen primarily from the growth of the concept of parental choice in school

selection, with its embodiment in the 1988 Education Reform Act in England and Wales. The first shoots of the concept appeared in earlier legislative demands (eg for the publication of a prospectus as required by the 1981 Education Act), but its roots may be found in social, cultural and political / ideological changes (Sayer and Williams (1989)) in the operating environment of schools after 1976 (James Callaghan's Ruskin College speech) and 1979 (the election of a new Conservative administration).

In the wake of a developing marketing culture there has been a growth of publications addressing external relations management (Kotler and Fox (1985); Gray (1991); Marland and Rogers (1991); Foskett (1992a)), but only a little empirical research has been undertaken to identify how, in practice, schools are responding to the challenges of the market (eg Bowe et al (1992). Research into the broad spectrum of management tasks in schools gives some brief glimpses of practice (Weindling and Earley (1987); Caldwell and Spinks (1988); Torrington and Weightman (1989))) and suggests that schools have little direct experience of operating in this sphere, lacking both expertise from management training and also the resources (human, financial and time) to work easily in this field.

The response of schools to the challenges of marketisation is the focus of this thesis, which seeks to address the need for structured research in this area of school management. It considers the growth of marketing, the understanding and interpretation of key concepts by schools, and the cultural and organisational responses to the new operational environment of the market. It must be emphasised that this thesis seeks neither to legitimise the development of social markets in education nor to condemn them. The literature on the nature and validity of such markets is extensive (see Chapter 2), and demonstrates that the case 'for' markets is not proven. However, it is unquestionable that a market of sorts exists in education which is "neither a natural nor a neutral phenomenon... (and which) is socially and politically constructed" (Ball (1993): 8) within which schools have to operate. It is their role as the "supply" side in this market place which is the focus of this thesis.

## **1.2 A Chronology of Marketisation in England and Wales**

This chapter examines the growth of marketisation in secondary schools, and is structured around an analysis of the growth of marketing in terms of a simple stage model with two stepwise transitions, demarcating three periods of development, ie..

a) The Proto Marketing Phase. This phase pre-dates 1979 when marketing was, in large measure, the product of competition between the state and independent sectors of education.

b) The Formative Phase. This phase extends from 1979 to 1988, and represents the socio-cultural readjustment of education to the demands of the radical social policies of the Thatcher Conservative administration.

c) The Expansion Phase. This phase covers the period since the 1988 Education Reform Act, when legislation created the formal characteristics of an education social market.

Within each of these phases, the sections which follow examine the driving forces, the catalysts and the constraints which structured the impetus to a changing cultural environment, in which schools were motivated to examine their relationships with the environment beyond the school gate - and to adopt, modify or reject the ideas of markets and marketing.

### **1.3 Early Perspectives on the Marketing of Schools - The Proto Marketing Phase**

While the real growth in the incorporation of the idea of marketing in maintained schools occurred steadily during the 1980s (see Section 1.4) and more rapidly in the period following the Education Reform Act (1988) (see Section 1.5), it must be recognised that schools, in both the independent and maintained sector, have always concerned themselves with recruitment of pupils and the management of image and external relations. The Proto Marketing Phase (i.e. pre-1979), however, was

characterised by an emphasis on competition only in those areas where economic and social conditions created real choice for parents between independent and state schools. Expertise in marketing, and attention to it in the management process, was very limited in extent. As Sayer has indicated,

“The relationship of school and context was formerly a grey area, an extension of normal school organisation, little considered and less esteemed in the practice of schooling.”

(Sayer (1989a): 3)

However, schools have always been aware of their image within their own local community. This may well stem from the desire of teachers, as professionals, to be seen to be effective in what they do, but it also reflects the values of schools in seeking to develop in pupils self-pride, confidence and a concern for the views and attitudes of external groups and individuals. School uniform, the monitoring of behaviour out of school, the invitation of the public to concerts and plays, community service by pupils and the operation of parents evenings and open days all stem from what are essentially professionally-defined views of the benefits of good external relations.

Beyond such a professional perspective, though, competition always existed in some areas and so necessitated promotional activities by schools. Competition between the private and state sectors, particularly in areas where parental income provided real choice, has always existed. Although the total proportion of school age pupils being educated in the private sector is only some 6%, in some areas this may be substantially higher. Bowe, Ball and Gold (1992) indicate that in “Riverway” LEA some 30% of children are educated in the private sector and that this has always been a major concern for local maintained schools.

In other localities the permeability and flexibility of “school catchment areas” has varied, and parents have been able to exercise some degree of choice within the maintained sector. In Southampton, for example, the

existence of both single sex and mixed comprehensive schools has meant that parents in some localities have had a genuine choice between two schools - a mixed school, or the appropriate single sex school - for their children on transfer to secondary school.

A further element may be seen to have directed schools towards promotional activity. Demographic change has imposed pressure on schools to make strong attempts to retain pupil intake in the light of potential and actual declining rolls. The threat of closure or amalgamation has made schools compete more strongly where this has been possible, or engage in a managed public relations and lobbying programme to convince educational policy makers of the educational and social value of small schools in remote locations or areas characterised by specific socio-economic conditions.

But how far has the existence of some element of parental choice and competition, or the need for lobbying, provided an impetus towards the development of promotional and marketing skills in maintained schools ? It is clear that, although schools have always promoted themselves.....

“Until recently, this has been done patchily, apologetically and instinctively. There has been little formal organisation, minimal expenditure and only occasional reference to (the) canons of marketing.....”.

(Gray (1991): 3)

Moran (1989), in his discussion of public relations in schools, has a somewhat more positive view of practice and contends that “in recent years a great deal of work has been done in this area by the best of our schools, although often on a somewhat ad hoc and improvised basis” (Moran (1989): 88).

He agrees, however, that such examples may be “isolated”, and expresses concern that...

“...it would be far more rare to come across any single institution that had fully thought out and developed its public relations policy to the point that it could withstand any major degree of scrutiny”

(Moran (1989): 88)

These perceptions of an absence of interest and expertise in the field of marketing are reflected in the literature on educational management from the 1960s and 1970s (eg Taylor and Baron (1969); Lawrence (1972)). Few references to marketing are found, and there is an implication that the management of school image and external relations is of low priority within the range of management tasks.

## **1.4 The Formative Phase (1979-1988)**

### **1.4.1 Introduction**

The Formative Phase represents the period of Conservative administration from the 1979 General Election through to the passage of the Education Reform Act in 1988. It may be seen as a time of substantial cultural change within education, with a vision from the government of an education system based on their own interpretations of choice, diversity and competition. An important aspect of this development was the introduction of legislation in specific areas of marketing activity which required schools to focus on their external links. None of these was, in itself, a benchmark or precursor of fundamental change, but each directed practice towards the changes enshrined in the 1988 Education Reform Act. The Education Act (1981) was the first step along the path, with its requirement that schools must produce a prospectus for the parents of prospective pupils. Subsequent legislation (the Education (School Information) Regulations 1981); DES Circular 9 / 93 (DES (1993)) refined this requirement by specifying the minimum information that must be included. A second development was the Education Act 1986 which introduced the requirement that all schools must hold an annual meeting of parents with the governing body to discuss the governors' annual report. This too provided an impetus for literature production, but, more

importantly, focused the attention of governors and heads on the need to consult and respond to parental views.

However, legislation is only the product of social and political forces. The following sections examine these forces and present a picture of “the state of the game” at the end of the 1980s, before the changes created by the 1988 Education Reform Act had come into effect.

#### **1.4.2 A Framework of Political and Economic Philosophy**

That the 1980s saw a radical philosophical shift in the view of the purpose and modus operandi of the education service held by government is unquestionable (Jonathan (1990); Bowe, Ball and Gold (1992)). This may be seen to represent a clear commitment to the role of the market and to consumer choice, representing a right wing perspective on the appropriate mechanisms for the management of the economy and society. Jonathan (1990: 17) suggests that “the recently dominant political ideology is the combination of two perspectives; the libertarian and the conservative”. The conservative emphasises “authority, discipline and acceptance of the hierarchical status quo” (Jonathan (1990): 17), while the libertarian emphasises three broad areas - the centrality of choice and the role of the market (Friedman (1980)); political and market accountability (Scott (1989)); and an anti-establishment approach which seeks to reduce professional protectionism or ‘producer capture’ (O’Hear (1991)).

This radical imposition of a market framework for the operation of education (and other public services) is based on three key ideas :- market theory as both a means to the efficient use of resources and to empower the consumer; the rejection of the educational outcomes of the previous decade as right wing writers (Boyson (1973); Friedman (1980)) sought to demonstrate the failures of egalitarian policies to provide the educated technocracy that the technological age demands; and a specific organisational and managerial philosophy that reflected the centrality of the consumer. In summary, the approach was designed, in the context of public services, to...



“..... wrest control of the service from providers and shift control to consumers and government agencies .....(and to)..... improve efficiency by increasing competition in the public sector”

(Gray (1991): 7)

Modern market theory (or Austrianism) is the product of the work of Friedrich Hayek and fellow workers at the Institute of Economic Affairs (Hayek (1976)), supported and expanded by, and perhaps more commonly associated with, Milton Friedman (1980). Market theory asserts that competition and consumer choice stimulate producers to strive to satisfy consumer wants as closely as possible and to seek better and more efficient ways of producing goods or services (for example by reducing production costs, or developing more cost-effective technology). Entrepreneurship amongst producers and freedom of choice for consumers are central elements of this economic philosophy, and external intervention in the market, for example by governments through policy leading to legislation, or taxation, is seen to hinder this process.

That an adherence to market theory was central to the development of marketisation in education is clear, but it has been argued that this reflected economic pragmatism rather than strict ideology. Warnock (1991) suggests that the “new ideal” (p 148) in education was a reflection of the economic crises of the late 1970s and 1980s. Government sought to reduce the pace of increase of public expenditure and to make the public sector more cost-effective, and saw the ideologically-based concepts of choice, the market place and competition as mechanisms to achieve this. Education was permeated by the language of business as “schools.... were not simply to run as businesses, they are businesses” (Warnock (1991): 148). Government emphasised education as a process to pursue economic excellence. Warnock shows how the language of education changed from metaphors “notoriously drawn from the garden and the greenhouse in the 1960s” (p 148) to the language of industry and of management in schools.

A third philosophical motivator to change was a desire to generate in the public sector the type of client / customer focused management processes that were promoted as good and effective practice in the business world. This concept emanates from, inter alia, the work of Peters and Waterman in the USA in the late 1970s, in which they demonstrated that the most successful U.S. and multinational companies operate in a culture of delegation of both financial and operational responsibility and decision-making. Managers and employees at all levels are thus empowered within the organisation. This, in turn, ensures real incentive and motivation for those in direct contact with clients. Their decisions are client centred and the operation of the whole enterprise becomes highly client (customer) centred (Peters and Waterman (1982); Peters (1987)). Market sensitivity and customer orientation are, therefore, seen as key elements in the success of organisations.

#### **1.4.3 Societal Change and Educational Change**

The expansion of marketisation in British schools during the 1980s was also the product of societal change in the context of education, and Sayer (1989a) has identified four key themes which characterise these changes. All are intermeshed as a complex, dynamic and self-reinforcing range of developments, and have contributed individually to societal change to differing extents at different times.

The first of these changes is the relationship between schools and the communities they serve. The traditional role of secondary schools has not been one of participation in the local community. As Sayer suggests.....

“Far from being part and parcel of the local community, secondary schools were about protecting able young people from local limitation; there was something of the monastic ideal, matched by the habits of uniformed segregation”

(Sayer (1989a): 4)

Concern over the separation of community and schools is not universally

identified, but the growth of links between the two is well-documented (Skrimshire (1981); Sayer and Williams (1989); Watts (1992)). In some areas (for example, Cambridgeshire) this has been through the formal establishment of community schools. In others it has simply been reflected in the growing participation of schools in the community, and vice versa. In each case, however, the need for enhanced communication between school and community has been a central requirement of change.

The second theme is that of change in the management of the education service itself. The history of the education service in England and Wales in the 1980s was characterised by the erosion of the role of Local Education Authorities through legislation. Empowerment of individual schools and their managers and disempowerment of local education authorities has seen the development of the "self-managing school" (Caldwell and Spinks (1988); (1992)). As schools assume responsibility for their own management in response to this disempowerment of the LEAs, so they must assume responsibility for their own external relations activities.

The third theme stretches far beyond the environment of education, for it relates to the experiential environment of young people. The penetration of mass communication media into the lives of children has meant that school is no longer the only "source" of education for children (if it ever has been). In curriculum terms, therefore, schools can no longer act in isolation, as islands, as if the community beyond their walls is not there.

The fourth theme relates to the conflict between the traditional break in the continuity of education in the U.K. at about the age of 11, when pupils transfer from primary to secondary schools. This has created a need for communication across the boundary to ensure that the transition for each child from primary to secondary school is as smooth as possible. Messer (1992) shows that some schools have developed substantial expertise in this arena and have at the same time, therefore, been developing significant promotional skills.

Foskett (1992a) has extended Sayer's analysis by identifying two further areas in which pressure for change has developed. Firstly, he suggests that of central importance has been the pressure towards accountability in the public services, including education, particularly in terms of what Scott (1989) describes as 'political accountability' and 'market accountability', which Brighouse (1992) traces to a period prior to the election of a conservative administration in 1979. The development of marketing communication systems and performance indicators have a dual purpose of both empowering the consumer in the market place through access to information, and ensuring that government and the public have indicators of the outcome and product of their investment in public education services.

The second factor identified by Foskett has been the growth of a child-centred culture within education over the last two or three decades. A parallel development has been the expansion of pastoral care structures in schools over the same period of time (Hamblin (1981)). The relationship of this focus to the concept of marketing lies in their shared view of the centrality of the 'consumer's' needs. This relationship also serves to provide a link between marketing and the in-school needs of children, a link not often perceived by teachers as a strong one. This lack of conceptual linkage will be explored in Chapter 2.

## **1.5 The Expansion Phase (post-1988)**

### **1.5.1 The Legislative Framework**

The 1988 Education Reform Act marked the translation of a number of substantial political and philosophical ideals about education and its organisation and operation into legislation. The public face of the Act was expressed by the then Secretary of State for Education, Kenneth Baker who indicated that it was designed to "carry the concept of parental choice to the heart of our educational system" (Baker (1988)). Central to the Act was the view of each school as an enterprise, functioning in a market with

responsibility for its own activities in that market and hence its own long term well-being.

It is not yet clear from the research record whether the Education Reform Act has either given consumers real choice and the opportunity for exercising it, or empowered schools to operate in a way in which they can respond to their clients. It may, of course, still be too soon to know what has been achieved, for “we know little as yet about how education markets work or what sort of “new order” they will produce” (Bowe, Ball and Gold (1992): 34).

The legislation introducing the market concept into education represented a strong commitment to the role of the market within the public sector, and paralleled similar developments within the health services. The Education Reform Act (for England and Wales), The Education Reform Order (for Northern Ireland), and The Self-Governing Schools, etc, Act (for Scotland) vary in detail with regard to implementation, but derive from the same key intentions. For the purposes of this thesis the focus will be on the Education Reform Act, which is the legislation which affects the vast majority of schools, teachers and children in the United Kingdom

Three key features of the Education Reform Act were designed to stimulate the market culture within education. Firstly, the concept of ‘open enrolment’ removed the limitations on enrolment at any maintained school to children from within clearly delineated catchment areas. The limit to total enrolment was defined as the standard number for the school in 1979, a number deemed to indicate the physical capacity of the school. Demographic changes throughout the 1980s meant that few schools had rolls by 1988 that were more than some 80% of that capacity and hence the potential for expansion in intake and competition for pupil recruitment was established.

The second component of “marketisation” was the imposition of Local Management of Schools (LMS). LMS involves the delegation of budgets and budgetary control from Local Education Authorities (LEAs) to

schools, with LEAs retaining only some 20-30% of the total budget to support central services. The formula for calculating the financial transfer to each school is dominated by a per capita element on each pupil. The value of each pupil is in turn related to age (Age Weighted Pupil Units- AWPUs), with older pupils having a substantially greater financial value than younger pupils. In Hampshire LEA, for example, the weighting of each Year 3 pupil (age 7 / 8) in the LMS formula is 1.000, while the weighting for each Year 7 pupil (age 11 / 12) is 1.378 and for each Year 12 pupil (age 16 / 17) is 2.215 (Hampshire LEA (1994)). Schools were, by this mechanism, empowered in the market in two key ways. Firstly, the size of the budget delegated by the LEA is dictated by pupil numbers on roll. Expansion of pupil numbers by additional recruitment will increase the size of the budget. Secondly, it empowers schools to create the culture or ethos for the school which they deem to be appropriate. Decisions on financial allocation become the responsibility of the school, and the vireing of resources into staffing, or capital expenditure or curriculum development or marketing, inter alia, is for them to choose.

The third key feature of the Education Reform Act was the extension of competition by the creation of new types of school to extend parental choice. This included the option for schools to apply for "Grant Maintained (GM)" status, the establishment of City Technology Colleges (CTCs). By 1995 632 secondary schools had been granted GM status (Grant Maintained Schools Centre (1995) - personal communication), and 15 CTCs (HMSO (1994) had been established, which between them provided approximately 12% of secondary school placements. Although still small in number, and distributed unevenly throughout England and Wales, they provide some diversification within the school market place.

### **1.5.2 Educational Perspectives on Marketing in the late 1980s**

The immediate post-ERA period was characterised by a polarisation of views on the marketisation of schools. Without empirical evidence of its real impact, two opposing stances appeared, one naively optimistic about the benefits of the market to schools (Chubb and Moe (1989); O'Hear

(1991); Tooley (1992)), the other doubtful of the place of the market in education, and strong in its condemnation (Jonathan (1990); Edwards and Whitty (1992); Ranson (1993)). A detailed consideration of these perspectives is presented in Chapter 2, but the broad thrust of the ideas is important to identify at this stage.

Even in the earliest post-ERA period there was considerable concern about the impact of marketisation leading to

“...the growth of ‘entrepreneurial schools’(.....and) a shift to increased pragmatism in educational policies.....in which it is possible to envisage that the needs of many pupils will be forfeited under the pressures of elitist market forces in a meritocratic society”

(Williams (1989a): 21)

Caricature and humour were frequent tools of the opponents of marketisation, with Hargreaves and Reynolds (1989) introducing a franchising analogy in the concept of “Kentucky Fried Schooling”, and Brighouse (1992) fearing the education market place becoming

“...a bewildering bazaar with noisy schools advertising their wares as they follow the prevailing fashions of consumerism, each recognising the accountability only of the market.”

(Brighouse (1992): 212)

Many commentators believed that the imposition of a marketing culture would undermine many successful developments within education by compromising educational ideals with the need to compete. As Sayer has suggested....

“The 1988 Education Reform Act appears to fly in the face of much that we are identifying as needful for the future. It relies on market forces and competition between institutions rather than cooperation in contributing to the local community”

(Sayer (1989a): 10-11)

A more optimistic prospect was provided by others, however, with a view that marketisation would enhance the relationship between schools and their constituencies to achieve significant mutual benefits - the building of partnerships, the creation of genuine community links, and the development of a real concern for 'quality' issues. Moran (1989) indicated that....

"In the best of.....schools, the concepts of partnership and task-sharing (will move) well beyond mere tokenism on the part of the school or raw consumerism on the part of the community into genuinely fruitful and productive relationships..."

(Moran (1989): 90)

However, even within a relatively optimistic perspective there was clear concern about the level of expertise necessary in schools both in general managerial terms and also with specific reference to marketing to enable these benefits to accrue. Williams (1989) concluded that...

".....although many schools have considerable experience in the development of shared governance of schools, the majority of them lack an explicit sense of an organic partnership that must be forged between schools and their communities"

(Williams (1989a): 19)

Williams goes on to emphasise the importance of "this inescapable function of schools" (p20) and suggests that....

"Not to recognise the importance of these relationships, occupying increasingly larger proportions of time and energy of the head and, at least, senior colleagues, would be a serious misjudgment of the current social and political Zeitgeist"

(Williams (1989a): 20)

It would appear, therefore, that the end of the 1980s was



characterised by a mistrust of the development of a marketing culture in many quarters, an optimistic welcome for it in others, but an acceptance of its inevitability within education throughout the system. Moreover, a concern that education should defend itself in public arenas was seen as a justification for a more pro-active stance in the field of external communications (Moran (1989)).

The section that follows seeks to define the key research foci of this thesis in the context of the issues that have emerged from the analysis of the growth of marketisation.

### **1.6 Key Issues - The Research Focus**

The purpose of this thesis is to describe, analyse and conceptualise some of the changes that have resulted from marketisation, to provide a view of developments to date and some insight into the future prospects for change. It will attempt to consider the “supply side” of the secondary education marketplace, for, as Ball (1993) suggests....

“Overall in the literature on social markets, particularly the education market, the emphasis is upon the demand side. Less overall is said about producers in the market apart from rather abstract notions.....”

(Ball (1993): 6)

This will be considered in a number of ways. Firstly, a fundamental question concerns the understanding of the concepts of marketing and markets that is held by all the players within the school system. The planning and focus of change is mediated by the interpretations of new concepts and policies by decision-makers and hence an insight into their perspectives is an essential starting point.

Secondly, there is a clear need to establish what, in managerial terms, schools have actually done since 1988 in the field of marketing. What have the decision-makers in schools, whether they be headteachers, governors or classroom teachers, done to modify the way in which the

school operates ? At the level of strategic planning there is a need to identify both the organisational structures that have developed to “manage” external relations and marketing, and the planning processes (both rational and non-rational), strategies and methods being employed. At the operational level there is a need to consider the current range of marketing and external relations approaches being used. Have schools, in fact, adopted a large and sophisticated portfolio of marketing practice ? Bowe, Ball and Gold (1992) express a widely held perspective on the application of management marketing tools to schools in suggesting that. the cultural realities of education.....

“..... make a mockery of the neat and trite prescriptions offered in many of the “how-to-do-it” management texts written to cash in on the ERA reforms”

(Bowe, Ball and Gold (1992): 166)

A third group of questions relates to the cultural dimension of change. At its most simple, this requires a consideration of the attitudes of staff at all levels to the challenges of marketing and external relations management. This too, though, has many facets in need of investigation. Firstly, how far has the culture of secondary schools mediated and modified the policy intentions of government ? Is their understanding of “marketing” and the market in line with that of policy makers ? If not, does this represent a deliberate attempt to distort the concept to match their own professional judgment of appropriate educational aims and activity, or does it represent implementational inadequacies in schools ? Secondly, it is important to consider whether the culture within schools is being modified in the directions identified by the driving political philosophies.

## **1.7 Summary**

This chapter has considered the background to the development of a market in state school education in England and Wales. It has examined in broad terms the main political / ideological, socio-cultural and legislative factors that established the new market culture of the 1990s. This has been

considered in terms of a simple three stage chronological model of development, comprising the Proto-marketing Phase (pre-1979), the Formative Phase (1979-88) and the Expansion Phase (post 1988). In the absence of a substantial empirically-based literature in the field of the marketing of schools, a number of research themes have been identified concerning the current state of marketing practice, which provide the main focus of this thesis. These concern....

- The ways in which schools have responded to the growing pressure to develop a marketing perspective
- The attitudes of staff at all levels to the challenges of external relations management and their understanding of the concepts of marketing
- The organisational structures being operated to “manage” external relations and marketing
- The planning models (both rational and non-rational), strategies and methods being employed in these areas

Chapters 2, 3 and 4 will consider the existing academic and professional discourse in relation to three specific dimensions of the study - the nature of the market and of marketing in education (Chapter 2); the organisation and management of educational institutions in relation to the planning and practice of external relations (including marketing) (Chapter 3); and the empirical evidence of current culture and practice (Chapter 4). From this background Chapter 5 provides a description and analysis of the methodology of the study in this thesis, while Chapters 6,7 and 8 focus on the presentation and analysis of the findings of the study in relation to the three key questions posed in Chapter 5. Chapter 9 discusses the broader implications of the study’s findings, and provides a summary and conclusion to the thesis.



**CHAPTER  
2**

**The Concepts of the Market and of Marketing in Education**

## Chapter 2

### The Concepts of the Market and of Marketing in Education

#### 2.1 Introduction

A consideration of the development of marketing in schools and its impacts must begin with a clarification of key concepts. While this is true of most areas of scholarship, it is particularly important in the field of markets and marketing in education, for it is contended here that a key characteristic of marketing in schools is a lack of clarity about the meaning of the concept. The development of a market-oriented approach within education raises key questions of interpretation and understanding, for the essence of discourse in any discipline is a shared understanding of the key elements of concepts, vocabulary and methodology.

This chapter focuses on this interpretation. It starts by considering the main characteristics of a 'market' and 'market system' (Section 2.2), and how far these ideas have validity within education (Section 2.3). There follows an examination of a range of conceptualisations of the process of marketing and attempts to clarify the relationships between the key ideas of 'marketing', 'promotion', 'public relations' and 'external relations' (Section 2.4). Finally, there is a consideration of a number of views of marketing in schools which analyse the concept in terms of its utility in school management (Section 2.5).

It is important, at an early stage, to consider the relationship between the two ideas of 'the market' and 'marketing'. It is argued here that the presence of a market *of sorts* (see Section 2.2) within the school system at present is not open to question. The existence of a market, however, does not dictate in any causal way the response that schools will have to it. Indeed, it will vary in its nature from place to place, and thus generate a spectrum of possible responses. For example, schools may commit themselves to strong competition, thereby implicitly (or explicitly)

accepting that the market is founded on a 'trading' relationship paralleling that in business; or they may seek to negate the market by collusion and collaboration with their competitors through various forms of monopolistic practice. The identification of 'marketing' in education is much less obvious. This reflects the idea that marketing is an operational process. Engaging in marketing is neither an inevitable consequence for an organisation of the existence of a market, nor is the existence of a market a necessary pre-requisite for an organisation to adopt a marketing approach to its management and operation. Pardey's (1991) distinction between 'trading' and 'marketing' relationships may be extended to suggest that a 'trading relationship' exists where a market operates, and a 'marketing relationship' exists when an organisation adopts a marketing philosophy. Thus the concepts of 'the market' and of 'marketing' are related, but not in any simple causal link.

## **2.2 Markets and Education**

The discussion of the generation of a "market culture" within education requires some consideration of the key features of a market economy. Ball (1990), Ball and Bowe(1991), and Bowe, Ball and Gold (1992) have identified a number of key features that are the essence of the market, and which can be considered to have a specific dimension within education as a result of recent legislation.

Firstly, a market is characterised by choice, in which customers or consumers may select which producer or supplier they wish to provide a service. The traditional choice between independent and maintained schools that *some* parents could exercise has been extended by the concept of open enrolment, which allows parents to select any school for their children which has the space to admit them.

Secondly, choice can only be exercised where there is diversity and differentiation between schools. Elements of this diversity exist in the maintained / independent school dichotomy, but LMS encourages schools to identify their own distinctive features and characteristics and to manage

their own affairs in a way which reflects the vision of the headteacher and governors. Diversity exists between all schools by virtue, *inter alia*, of their differing hinterland, buildings and grounds, institutional history, and the philosophy and methods of the staff. In addition, though, the development of Grant Maintained Schools, Technology Schools and City Technology Colleges (CTCs) has increased diversity in the maintained sector and, hence, in theory, extended parental choice.

Thirdly, competition is a key characteristic of the market economy, for it is competition that is seen to make schools more responsive to customer and client “wants”, more efficient in the use of resources and more innovative in their *modus operandi*. Competition is a process that operates in the market whether or not it is controlled or manipulated by the providers (i.e. schools).

Fourthly, for the market to function some form of exchange mechanism, or price mechanism must be in operation. The development of formula-based per capita funding under LMS is the mechanism in operation in England and Wales, for the funding received by each school is determined by pupil numbers. Increasing resources for the school can be achieved by increasing pupil recruitment, and this will push schools to compete with each other .

A fifth element in the market mechanism is the development of appropriate forms of organisation in the management of schools to enable them to compete in the market. Schools must develop systems for planning and managing the deployment of resources within the school in such a way that the school can be responsive to the market.

It is not yet clear how far the market, or approximations to the free market, have been established within education, but the key elements of the market outlined above seem to be in place to some degree. It is important to consider briefly here, though, some alternative conceptualisations of the nature of the schools market .

The differences between commercial markets and the operation of markets within education has stimulated the identification of such social markets as “quasi markets” (Le Grand (1990)). The term is used to reflect the idea that, although there is competition between a number of service suppliers ie schools to “replace the monolithic state providers” (Le Grand (1990): 5), these suppliers are not wholly independent of external control (political and economic) nor are they necessarily in pursuit of maximising their profits. Le Grand suggests that...

“These welfare quasi markets....differ from conventional markets in one or more of three ways: not-for-profit organisations competing for public contracts, sometimes in competition with for-profit organisations; consumer purchasing in the form of vouchers rather than cash; and, in some cases, the consumers represented in the market by agents instead of operating by themselves”

(Le Grand (1990): 5)

Hatcher (1994) extends this description to include three other characteristics of what he terms ‘surrogate markets’. Firstly, government control places a funding incentive rather than a profit incentive into the system, in the case of schools linking parental choice and formula funding. Secondly, the ability of suppliers (schools) “to respond to market signals is severely circumscribed by the state financially and legally” (Hatcher (1994): 52). Schools, for example, cannot engage in many of the financial operations (eg realising capital assets, operating deficit budgeting) that the private sector can. Thirdly, they cannot compete on price, only on the basis of differentiation, and this itself is limited by government curriculum control. The differences between free markets and quasi markets, therefore, are substantial.

A further important element in the characterisation of education markets is described by Bowe, Ball and Gold (1992), who suggest that there is no single market in education, but that the market place is characterised by multiple local markets each of which has a quite distinctive history and constraints. The relationship between each school



and another is a “micro-market”. In addition, the edge of the education market is blurred because increasingly it overlaps with the leisure, financial and labour markets, which raises basic questions about the nature of the education ‘product’. The products of education may be seen as highly diverse and relate to the different aims of schooling identified, for example, by Stenhouse (1975) as training, transmission, initiation, induction. Each direction of output (jobs, further education, higher education) is in itself a specific market which schools operate in, and the preparation of pupils for any of these is the development of a product. The education market place is hugely complex, therefore. However, it is reasonable to assert that this is a characteristic of all markets and that the education market is no different, therefore, from any other.

## **2.3 A Critique of Marketisation in Education**

### **2.3.1 Introduction**

The ingress of marketisation to education is a product of the socio-political culture of the 1980s. However, teachers, educational managers and academics from a range of political perspectives have questioned the validity of the concept within education, a questioning which has envisioned potential outcomes of marketisation from irrelevance and irritation to a strong and rapid decline in the quality of educational provision in schools. A detailed analysis identifies a number of concerns - a concern that educational legislation inherently compromises the idea of a free market; the view that parents do not engage in or with rational decision-making about school choice; concerns about egalitarian issues and the compromising of teachers’ professional judgments; and concern about the impact of marketing on the quality of educational provision for all. These issues will be examined below.

### **2.3.2 The double-bind of market legislation**

The Education Reform Act (1988) was the legislative vehicle not only for introducing elements of the market culture into education but also

for establishing a National Curriculum for 5-16 year old pupils in state schools. This effectively reduced the scope for schools to differentiate themselves in the market place, for it dictated the nature of the 'product' of schools. The National Curriculum also provided, through its structure of testing and assessment, a vehicle for parents (and others !) to measure school performance for the purpose of choosing schools. However, by intervening in this way in the operation of the market the government is influencing or constructing choice by delineating key parameters for choice. This double-bind for schools has been portrayed by Gray (1991):-

"Market forces have never been allowed to operate freely in government-funded education services, and government interference with such forces is more marked today than it has ever been, despite current rhetoric. Educational institutions are being exhorted to market themselves with one hand tied behind their backs, and both feet firmly chained to separate stakes labelled 'Department of Education and Science' and 'Department of Employment'"

(Gray (1991): 173)

This double-bind, therefore, is the product of the fundamental tension between the conservative and libertarian components of present government philosophy. The 'conservative' emphasis on control and the 'libertarian' emphasis on choice operate as opposed forces within the education system, and create an irreconcilable 'problematique' for education managers and teachers.

### **2.3.3 Parents, Markets and Decision-Making**

Market theory assumes people to be optimising rational choosers, with choice being seen as IRC - Individualistic Rational Calculus (McLean (1987) ). This assumes that their decision-making is objective and rational and that individuals have access to adequate quantities of appropriate information about schools. Neither of these assumptions appears tenable, and the extensive literature on decision-making (eg Simon (1976); Janis

and Mann (1977); Radford (1977); Hindress (1988)) supports a view of individuals essentially as reluctant decision-makers, focusing on short-term perspectives, making decisions based on limited understanding and information ('bounded rationality') and content to take decisions which are adequate rather than optimal. Simon (1976) indicates that .....

"The decision-maker satisfices rather than optimises. That is, he looks for a course of action that is 'good enough', that meets a minimal set of requirements. (...) He economises on the collection of information and evaluation of alternatives by searching only for a course of action that achieves a satisfactory result"

(Simon (1976): 51)

The implication of this view is that parents, in seeking a choice of school for their child, will not seek a decision which is wholly objective and based on "vigilant decision-making" (Janis and Mann (1977): 10). By choice, and also by the lack of availability of the total field of information pertinent to their decision, parents are subject to bounded rationality (Simon (1976): 69) and thus engage in "non-vigilant" decision-making.

A consideration of the involvement of parents in decision-making reveals a number of further issues. Parents are not equal in their ability to respond to the market conditions because of differences in wealth, culture, educational background, access to information and social opportunity. The ability of parents to make themselves and their children "attractive" to the popular and successful schools which will seek to attract the "effective consumer and value-adding client" (Ball (1993): 8) is what Brown (1990) has called the growth of "parentocracy". Lieberman (1989) distinguishes "active" and "inactive" choosers. Active choosers may be very influential in setting the tone and style of the school their children attend with schools seeking to be responsive to parental views - schools may become the sort of school activist parents demand, rather than schools which respond to the needs and wants of all their clients, both parents and pupils. Bowe, Ball and Gold (1992): 33) question whether this basic inequality in the market for different parents is appropriate...

“Is it enough to satisfy the needs of those who drive the market, the DES’s estimated 5-10 per cent (of parents) ? Or should schools have a wider public welfare, public service brief ?”

Even where parents have the motivation and commitment to make active choices, there may be considerable limitations on their ability to put this into practice. As Lieberman claims,...

“Some schools are already operating at capacity, and have waiting lists. Many schools are denominational and may not wish to enrol pupils outside their denomination”

(Lieberman (1989): 124)

Others may be geographically and economically constrained from making real choices. As the more popular schools make selections, so parents may be left with choosing between a number of schools of which none are desirable. It is clear that, as Sexton and Brighouse (1990) suggest,

“Many disillusioned parents have discovered (that) the promise of choice rather than preference is largely illusory. In the end it is schools that choose parents, not the other way round”

(Sexton and Brighouse (1990): 25)

The role of short-term factors in the decision-making of parents has also been emphasised (Janis and Mann (1977); Bredo (1987)). They suggest that parents may be more influenced by issues of immediacy such as the availability of bus routes or school uniforms than they will be by examination results at 16 or higher education admissions achievements, an idea demonstrated by Adler and Raab (1988) in relation to schools in two Scottish cities. Lieberman (1989) also indicates that social and cultural pressures may well be stronger influences in parental choice than nominated educational indicators. For example, parents may be more influenced by the short-term desires of their child to stay with friends in a move to secondary school than any long-term educational objective. Bredo

(1987) extends this as a fundamental criticism of marketing models in education by indicating that when parents make choices in education they are in fact choosing among the forms of social life they want for their child, and claims that...

"These social side effects are not taken into account by the market model, which is efficient and responsive only when such effects do not exist"

(Bredo (1987): 70)

Finally, the role of parents as customers is an important one if the concept of marketisation is to be developed to the full, yet the role they seek may be much more complex than this. Naybour (1989) considers that a spectrum of relationships exists between...

"...a constructive partnership in which parents are recognised as 'partners in a shared task', and the brash harsh world of uninformed consumer pressure and free market forces"

(Naybour (1989): 108)

Parents, therefore, both as potential customers and as existing partners in their childrens' education, appear to participate and make decisions in ways which challenge fundamentally their role in classical market theory.

#### **2.3.4 Egalitarianism, Public Service and Marketing**

The development of comprehensive education in the United Kingdom was founded on the key concept of equality of opportunity. It is not appropriate to develop here the essentially political arguments for and against the ideals and achievements of comprehensive schools. Its relevance here is the question of whether government should have the responsibility for ensuring equality of access to education for all. Friedman (1980), supporting the ideals of the free market and the view of education as a system to optimise the economic benefits to society in total rather than the social needs of the individual, suggests that...

“Social engineering is not the purpose of education, and it is unfortunate that schools are now regarded as a means of promoting social mobility, racial integration and other objectives only distantly related to their fundamental task”

(Friedman (1980): 189)

The concern for a greater degree of egalitarianism through social engineering, however, is strongly argued. Jensen (1991) suggests that

“...human variation should be grasped and dealt with constructively by bringing to bear on it as much knowledge, humaneness, generosity, reason, wisdom and farsightedness as society can possibly muster”

(Jensen (1991): 169)

This view is developed into a clear assertion against the concept of the market and the economists' views and in favour of a command economy in education by, inter alia, Warnock, who suggests that .....

“...(in) the market place there is no place for the dim, the disadvantaged, the disabled or the slow. They are no longer entitled to the best”

(Warnock (1991): 151)

Jonathan (1990) extends this idea to emphasise the paradox that parents exercising their individual rights in the education market place may, in fact, be damaging their own long term interests:-

“If we think not of individual parents but of parents in general as a category of individuals then their interests may be ill-served by the granting of (rights of choice)”

(Jonathan (1990): 18)

The views of Friedman and Warnock are clearly polarised and

seem to have little common ground for a practical compromise. Wilson (1991) has suggested that in reality the balance between egalitarianism and the free market must be pursued, so that....

“We should neither over-protect children from the hard (and inevitable) fact of human differences in talent, ability and motivation, nor make the children’s lives wholly into a competitive game which gives them no other identity. The fact is, of course, that fraternity may exist without the kind of equality or homogeneity often demanded.”

(Wilson (1991): 228)

This might be used to support almost any intermediate position between the free market in education and total central dictat of provision. It does not deny the need for parental choice and competition, yet takes a perspective based on compassion and support for the disadvantaged. There are strong ethical, professional and practical reasons for such an approach, and Gray (1991) indicates that schools in both Avon and Warwickshire have sought to operate collaboratively while adopting a clear marketing approach emphasising the quality and diversity of their educational provision. The National Association of Head Teachers (1990) has developed a code of conduct that proscribes the use of inducements to parents, the direction of money from teaching funds to marketing activities and the use of promotional methods that compare other schools unfavourably.

The ethical dimension and related issues is clearly a negative constraint on the willing acceptance of marketing by many teachers. Bowe, Ball and Gold (1992) contend that finding the balance between educational objectives, budgetary considerations and market considerations is fundamentally problematical for many teachers. The role of teachers in mediating educational change has been considered by a number of writers, including Ball (1987) and Fullan (1991). Studies in post-compulsory education (Megson and Baber (1986); Keen and Greenall (1987)), and in the compulsory phases of education (Foskett (1992a); (1992b)), suggest that teachers regard marketing as an alien concept that

has no origin or place within the educational environment. It is regarded as a diversion from the central educational tasks of schools and as the expansion of bureaucratic and administrative functions. More importantly, though, the mistrust of the concept is based on the view that marketing involves a misrepresentation of the truth through promotional activities, which will lead to “.....false and exaggerated claims about what schools can do for students” (Lieberman (1989: 139).

As a key social process education is viewed by many teachers as a legitimate area of substantial “unearned” funding allocation from central government which should not be determined by the competitive framework of the market place. As Lieberman (1989) indicates....

“ Teachers tend to be hostile to economic competition....(because) the politics and culture of education are dominated by redistribution of wealth, not creation of it. Teachers assert and believe that large appropriations for education are productive social investment”

(Lieberman (1989): 187)

Furthermore, choice appears to be seen as an approach which compromises collective benefit for the sake of individual gain, and this runs contrary to the reasons why many teachers enter education. It is clear, therefore, that the importance and persistence of egalitarian perspectives and ethical constraints amongst teachers challenge the idea of a value-free market system envisaged in Hayekian market theory.

### **2.3.5 Competition, Quality and the Consequences of Marketisation**

An important area of concern expressed by opponents to the idea of marketisation is that competition inevitably generates “winners” and “losers”, with those schools which succeed in the competition experiencing an excess of demand over supply, and those schools which lose set into a positive feedback cycle of decline. This cycle of decline is exacerbated in educational environments because security in decision-making is



paramount and parents are less likely to take risks in their decisions. Parents will tend to make conservative and safe choices in their selection of school. The school which acquires a poor reputation, whether in the short-term or the long-term will not be selected. Since resources follow pupils under LMS rapid decline may follow for a school experiencing a decline in resources because of failure to recruit pupils. Furthermore, it must suffer the consequences of that decline for the duration of that age cohort in the school - perhaps for as long as seven years.

Adler and Raab (1988) suggest from their observations about the consequences of marketing in Edinburgh and Dundee that a number of 'magnet' schools and 'sink' schools are beginning to emerge. The emphasising of inequality in educational provision emerges from this study, producing....

" a system which threatens to be divisive, creating disadvantage for the children of parents who are not effective in exploiting the opportunities of the market"

(Thomas (1988): 23)

Lieberman (1989) suggests that ....

"Some schools will end up with the disadvantaged minorities, disabled, disruptive and / or otherwise difficult or expensive to educate students"

(Lieberman (1989): 232).

A number of key social and political issues emerge from this analysis, for the creation of magnet and sink schools is the demise of truly comprehensive education (Sutcliffe (1989)). Where schools can choose parents, by any criteria, even if only how well their "face fits the school", selection is occurring, and the obverse of selection is segregation. Ball (1993) suggests that working class families and ethnic minorities will be disadvantaged because the market idea "presumes certain skills, competencies and material possibilities (access to time, transport, child

care facilities etc)” (Ball (1993): 13) which such groups do not possess. The market is seen, therefore, as a mechanism for social differentiation:-

“The market provides a mechanism for the reinvention and legitimation of hierarchy and differentiation via the ideology of diversity, competition and choice”

(Ball (1993): 16)

However, two problems of interpretation of enhanced performance have been identified by Elmore (1987) and Lieberman (1989). Firstly, there is the concern that competition will create an illusion of improved performance by pushing schools to emphasise their strengths and disguise their weaknesses. Effective promotion may increase the number of ‘consumers’ by implying high quality of provision, while a better provision by another school may not attract consumers simply because its promotional programme has not been effective. Secondly, as Brede indicates,...

“The fact that selection effects are relatively strong makes it easy to be fooled into believing that (an educational) programme produces higher achievement when it simply attracts more educationally-advantaged groups of students”

(Brede (1987): 8)

These “selection effects” are the positive feedback processes that make attractive schools ever more attractive and enable them to select the pupils whose likelihood of success in terms of significant performance indicators is high.

In summary, therefore, there are substantial concerns about the negative impact on the education provision for many children of the ability of some parents to select ‘the best’ of education for their children. The role of market forces in stimulating differentiated provision across the school system raises basic concerns about high quality education provision as a fundamental state service.

## **2.4 Marketing in Education**

### **2.4.1 The Concept of Marketing**

The concept of marketing is, for most schools and educational professionals, an imported concept, open to wide interpretation. However, the absence of simple definitions and shared understanding of the concept even within its arena of origination, the business environment, exacerbates the problem of interpretation.

Figure 2.1 contains a number of definitions of marketing from within the discipline of Marketing. Although many common strands can be seen (for example the idea of “exchange” between individuals or groups), the specific emphasis is different for each one. Drucker (1954), Barwell (1965), and Brown (1987) emphasise marketing as a philosophy, as an approach to the management of relationships between those engaged in exchange. Christopher et al (1980) see marketing as a process, both in terms of management planning and in terms of operational activity. Mazur (1947) and Kotler (1984) consider marketing as a macro-scale process within society as a whole and might be seen to be engaging in political philosophy as much as defining marketing. There are contrasts, too, in the outcomes that are considered for the marketing process. The business orientation of much of the work reported here is demonstrated in the perception of profit as a key outcome, yet the importance of other potential outcomes is also clear. Christopher et al (1980) concede that there may be “other objectives” for marketing, while Barwell and Drucker consider the satisfaction of customer needs and wants to be a primary focus of marketing.

Generating a universally acceptable definition of marketing, therefore, is extremely difficult. Lancaster and Massingham (1988) suggest that it is necessary to summarise the key facets of marketing as a conceptual framework with eight dimensions within which it is possible to place an emphasis in definition according to need and practice (Figure 2.2). It is possible, however, to synthesise these eight dimensions into two

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*" Marketing is the management process which identifies, anticipates and supplies customer requirements efficiently and profitably"*  
**(Institute of Marketing, quoted in Baker (1991): 5)**

*"Marketing is the delivery of a standard of living to society"*  
**(Mazur (1947): 148)**

*"Marketing..... is not a specialised activity at all. It encompasses the entire business. It is the whole business seen from the point of view of its final result, that is, from the customer's point of view"*  
**(Drucker (1954): 56)**

*"The marketing concept is a philosophy, not a system of marketing or an organisational structure. It is founded on the belief that profitable sales and satisfactory returns on investment can only be achieved by identifying, anticipating and satisfying customer needs and desires"*  
**(Barwell (1965): 3)**

*"The aim of marketing is to know and understand the customer so well that the product or service fits him and sells itself"*  
**(Drucker (1973): 4)**

*"Marketing is the primary management function which organises and directs the aggregate of business activities involved in converting consumer purchasing power into effective demand for a specific product or service, and in moving the product or service to the final consumer or user so as to achieve company set profit or other objectives"*  
**(Christopher, McDonald and Wills (1980): 9)**

*"Marketing is the way in which an organisation matches its own human, financial and physical resources with the wants of its customers"*  
**(Christopher, Kennedy, McDonald and Wills (1980): 3)**

*"Marketing is a social process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others"*  
**(Kotler (1984): 4)**

*"Marketing is a complete approach to running a business through focusing all of the company's actions on to the customer"*  
**(Brown (1987): 3)**

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**Figure 2.1 Some definitions of marketing**

- 
- *Marketing focuses the firm's or individual's attention towards the needs and wants of the marketplace*
  - *Marketing is concerned with satisfying the genuine needs and wants of specifically-defined target markets by creating products or services that satisfy customer requirements*
  - *Marketing involves analysis, planning and control*
  - *The principle of marketing states that all business decisions should be made with a careful and systematic consideration of the user*
  - *The distinguishing feature of a market-oriented organisation is the way in which it strives to provide customer satisfaction as a way of achieving its business objectives*
  - *Marketing is dynamic and operational, requiring action as well as planning*
  - *Marketing requires an improved form of business organisation in order for marketing to be able to lead and catalyse the application of the marketing approach*
  - *Marketing is both an important functional area of management and an overall business philosophy which recognises that the identification, satisfaction and retention of customers is the key to prosperity*

**(Lancaster and Massingham (1988): 4-5)**

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### **Figure 2.2 The dimensions of marketing**

specific elements of the concept of marketing - marketing is both an overall philosophy for an organisation, and a functional area of management.

As a functional area of management marketing involves the application of a range of strategies and techniques to achieve specific objectives in relation to the organisation's existing and potential customers. In a large organisation these will be undertaken by specialists in a marketing department - in a small one they will be the responsibility of

generalists. A functional view of marketing means that its operations are only seen as of day-to-day relevance to the marketing staff themselves and not the whole organisation.

As an overall philosophy, marketing is much more central to the operation of an organisation, with Drucker contending that..

“Marketing...is not a specialised activity at all. It encompasses the entire business. It is the whole business .....

(Drucker (1954: 56)

Marketing is seen, therefore, as....

“...an overall business philosophy, a way of thinking about business, a way of working which runs through every aspect of the firm’s activities, (....) that puts the customer at the very centre of the firm’s corporate purpose”

(Lancaster and Massingham (1988): 6)

The approach to marketing that is adopted varies between organisations. This reflects a wide range of personal, historical, economic, technological and other socio-economic environmental factors. Three types of organisational orientation may be identified, however:-

- Product-oriented organisations
- Sales-oriented organisations
- Marketing-oriented organisations

Product-oriented organisations are concerned primarily with producing the product, whether it be a “good” or a “service”, that they have skill and expertise in producing. The requirements of the customer are of secondary importance, for it is assumed that the producer ‘knows best’. Marketing is seen as a secondary function designed to ensure that the product is ‘delivered’ to the customer.

Sales-oriented organisations recognise that selling is central to

their survival. Emphasis is placed on promotion, for it is assumed that consumers can always be persuaded to buy, or to buy more, through appropriate use of advertising and sales techniques. However, such organisations are essentially product-oriented, with their goods and services produced with little regard to customer requirements. This view of marketing is a common perception of the whole process: -

“Even today, many people think of marketing as being synonymous with selling and promotion”

(Lancaster and Massingham (1988): 11)

A marketing-oriented organisation, in contrast, is one in which the customer is central to its operation. Its emphasis is on satisfying customer requirements by providing goods and services that customers want. As Lancaster and Massingham (1988: 13) suggest:-

“It is the satisfaction of the customer that is seen as the key to prosperity, growth and survival”

The contrast with a sales-orientation is well-expressed by Drucker...

“There will always...be need for some selling. But the aim of marketing is to make selling superfluous. The aim of marketing is to know and understand the customer so well that the product or service fits him and sells itself”

(Drucker (1973): 65)

A marketing orientation has implications for the organisation and its management structures. As a business philosophy, marketing will not be confined to the sales department but will be central to the organisation's approach. Each element of the organisation's operation from strategic planning to front-of-house activities will be dictated by the customer-focus, and this brings clear training and staff development implications .

The relationship between these three approaches has been

considered, inter alia, by Drucker (1973) and Kotler (1984), who suggest that the three market orientations are not separate and discrete but represent a continuum, or spectrum. Moreover, they suggest that organisations, in response to their own internal dynamism and changing external environmental factors move along this continuum over time - it is in essence a developmental process. This raises key issues about organisational change and its management, with real implications for individuals within organisations. In particular, it sees those engaged in the production and provision of the “good” or “service” moving from a position in which their activities drive the organisation to one in which they are responsive to externally-imposed expectations.

Cowell (1984: 44-45) provides a simple list of the characteristics of marketing in the context of the service sector. This includes both functional and philosophical dimensions and suggests that marketing is characterised by...

- an attitude of mind in which the centrality of the customer focus permeates the whole organisation
- an internal organisational system which ensures that responsiveness to customer wants and needs drives the operation of the organisation
- the integration of a range of activities that contribute to the marketing process, including marketing research; customer-driven product / service design; the planning of external communications; quality control in service / product delivery; evaluation of the whole marketing process and customer satisfaction.
- the use of an array of techniques and tools to support these processes, including, for example, SWOT Analysis, Buyer Behaviour Analysis, Portfolio Analysis .

It is asserted here that these four indicators may be used as a checklist of adoption of the marketing concept within organisations, including educational institutions. Product or service-focused organisations, and sales oriented organisations might be expected to emphasise the third and fourth characteristics suggested by Cowell. Sales-



orientation will necessitate the use of appropriate marketing processes, but it might be expected that there will be little use of the tools and techniques of market analysis since the design and production of the product / service is dictated by the producers themselves. A product-oriented organisation will demonstrate fewer of the marketing processes, the application of fewer resources to marketing, and the organisation of promotion as a subset of other management functions rather than as a separate sales / marketing department.

The organisation that has a clear marketing orientation will be identifiable by the presence of all four of the characteristics suggested by Cowell. Marketing will be the primary focus of the organisation's structure and activity and will permeate the discourse of all the management and production activities that it undertakes. The centrality of the customer will be enshrined in the mission of the organisation.

#### **2.4.2 The Concept of Marketing in Education**

The concept of marketing is one that appears illusive in definition and variable in interpretation, particularly in the context of education. Within the growing literature there is a marked lack of commonality in its interpretation and a number of factors may underlie this.

Firstly, service industries have not traditionally taken a strong marketing perspective, despite their profit focus (Stanton (1981); Cowell (1984); Kotler (1986)), for reasons outlined by Cowell (1984: 45-46).....

- Service "products" are inherently intangible which makes their presentation and demonstration more difficult in a promotional arena. Where the "product" is long-term in its rewards to the customer (eg education) as opposed to short-term (eg a holiday) that intangibility becomes even greater and less easy to "package"
- Services in the professional sector (eg law) regard marketing as unethical and may, in professional codes of practice, prevent marketing activity

- Some service sectors have always experienced demand for their service far in excess of their ability to provide it (eg higher education), so see no necessity for a marketing perspective
- Some organisations have enjoyed monopoly power in their service area, and so have had no necessity (in survival terms) to adopt a marketing approach
- Little professional guidance has been available to those seeking to adopt a marketing perspective

We may add to this list a sixth reason, based on the concept of professionalism. This perceives the professional as the 'expert' and the monitor of quality, whose expertise dictates what is provided to the customer. Responsiveness to the market, except in the broadest sense of ensuring there are enough customers, is therefore deemed unnecessary.

Secondly, of course, it may reflect the appropriateness of the concept within education. It may be that it is a concept that cannot be rationalised within a service that is focused on the implementation of professional judgments and values rather than on the generation of profit for shareholders. Gray (1991: 24) emphasises that the key measurement of success in the public sector is not profit, as it is even for services in the private sector, and some other type of indicator is necessary:-

"The purposes for which public sector institutions such as schools and colleges were established go beyond mere customer satisfaction. Otherwise the original mission becomes perverted... . Public sector service organisations have public service duties and responsibilities which are likely to expect them to reach out to those potential customers which existing provision fails to reach. They also need to provide services which go beyond satisfying customers' wants, and tackle real needs which may not be appreciated by those customers"

(Gray (1991): 25)

Pardey (1991) has attempted to differentiate 'educational

marketing' from 'commercial marketing'. This emphasises that the achievement of specified non-profit goals, either socially or professionally defined, is the essence of such organisations. The views of potential clients will not necessarily coincide with the strategies necessary to achieve those goals and may not necessarily be considered - "the consumer's needs (will be) consciously subordinated to specified corporate objectives" (Pardey (1991): 3). This would appear to be the case where no element of consumer choice exists, but in education this is no longer the case. Consumer choice, even on a marginal scale, affects the viability of a school or college. Reduced income generation leads to a cycle of decline where the quality of provision will be adversely affected - and other consumers will then exercise their choice to use an alternative school. As non-profit organisations schools have limited capacity to generate reserves of funding to tide them over poor recruitment years. The time lag between income and expenditure is short in the financial management of schools, and there is little cushion against rapid decline. It may be that their characteristic as non-profit making institutions makes a marketing approach more essential than with a profit-making organisation. Rather than there being a "diminution of consumer sovereignty" (Pardey (1991): 2), the non-profit organisation in a competitive environment must enhance consumer sovereignty.

Thirdly, it may reflect a lack of understanding of the idea of marketing. This in turn may indicate a simple unfamiliarity with the concept as operated by business, which is a reflection of a lack of marketing experience, or it might be a genuine attempt to translate a concept from one environment to another which has failed. An alternative view might be that it reflects attempts to discredit the concept by translating it in a form that is not helpful or which translates it from a concept with "unacceptable" political and social connotations to one that is acceptable, but which is not close to the original meaning.

It will be helpful at this point to consider some of the conceptualisations that have been generated. These encompass definitions ranging from those that are simply a direct translation of ideas

from the profit-making organisational environment, to those which demand a new definition that is the preserve of education, to those which seek no definition at all.

The latter group is typified by the approach of Marland and Rogers (1991), who do not attempt to define marketing in a broad sense and see it simply as a process of communication. It is not seen as any form of underlying philosophy of a client-centred institution, but as a means of informing parents about the “product” of the school. This view of marketing as communication outwards from the school is also presented by Devlin and Knight (1990), who suggest that schools should “...ignore all jargon.....(for) marketing and public relations are essentially about communications” (Devlin and Knight (1990): 3).

Barnes (1993) takes a much broader view of the concept and attempts a definition which is comprehensive, encompassing the philosophical and organisational dimensions of a marketing approach.

“(Marketing is) organising the structure and behaviour of a school around its clients. It is a philosophy or approach to providing education services which is essentially consumer-oriented. It involves identifying needs and wants of specified clients, designing (with due regard to prevailing educational and professional standards and ethos) appropriate education services to satisfy those identified needs and wants, communicating the existence of the education service to clients and delivering the desired product to them”

(Barnes (1993): 1-2)

It is apparent, however, that such a definition becomes clumsy, and becomes focused on a description of practice rather than on an attempt to define marketing in terms of its objectives.

A simpler attempt at concept clarification has been made by Gray (1989), who uses the Institute of Marketing’s own definition, ie..

“Marketing is a management process responsible for anticipating, identifying and then satisfying consumer wants and needs with a view to making a profit”

(Institute of Marketing, quoted in Baker (1991): 5)

but adds the rider that

“The notion of profit is not one that fits in comfortably with public sector service, and its equivalents (need to be considered). The essence of this definition is the central idea of making management decisions, including the investment of resources, in order to seek identifiable benefits for those using the service - the pupils and students”

(Gray (1991): 2)

Gray emphasises the difficulties of translating the concept from the business world to education

“Those resistant to the view that the education service will improve as soon as it follows the more ‘business-like’ approaches of the private sectors can be reassured (...). While there is much that the education service can learn from the private sector....there are no easy recipes for improvement and no ideas which can be lifted wholesale and transported into schools and colleges”

(Gray (1991) : 4)

Indeed, Gray indicates that the “passage of ideas between public and private sectors....is not a one-way street” (p4), and that while much of value can be identified from the private sector marketing approach, “some of the home-grown approaches to marketing developed by schools and colleges are sufficiently novel and distinctive to be of interest to non-educational organisations” (p4).

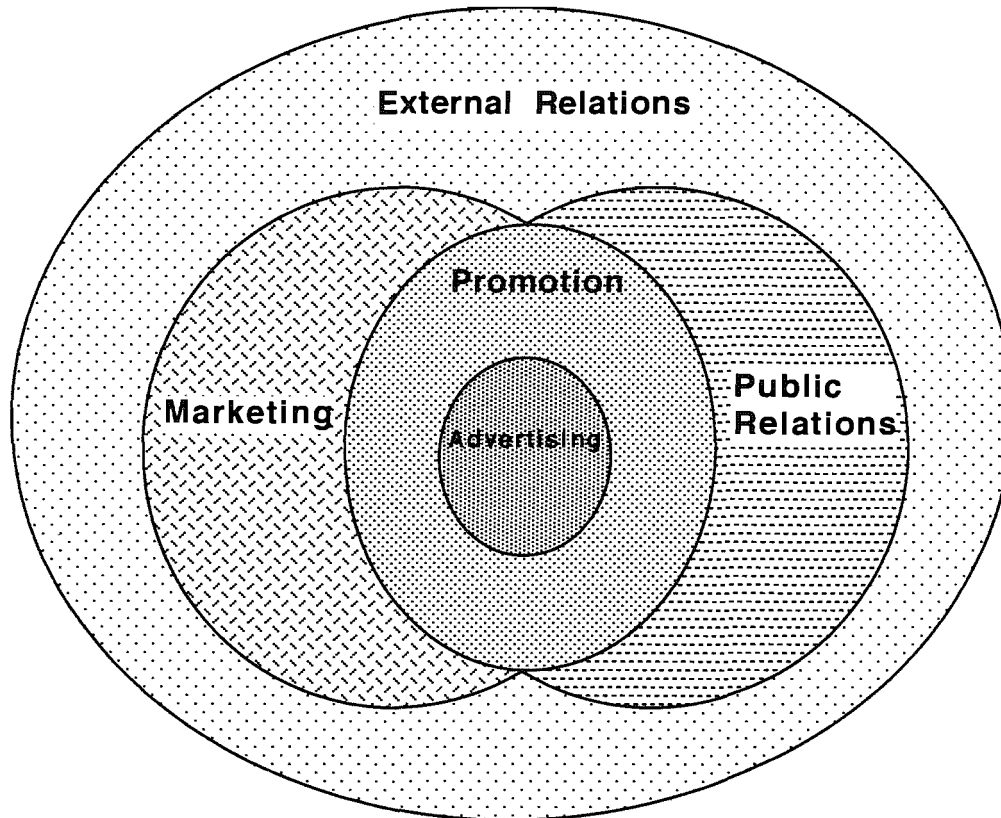
A number of writers have adopted a view of marketing which is

rather more broadly-based than that espoused by Gray. Williams (1989a), for example, emphasises the broad boundary management role of schools and a concern for both those external publics who have a direct relationship with the school (eg parents, education officers) and those who have an indirect relationship with the school or “none at all” (Williams (1989a): 18). Within this broad framework lies the marketing activities of the school, yet this is clearly not the nature of many of the relationships that are being managed within the overall concept of external relations. This vision of marketing as a sub-concept within the broader idea of external relations management has been emphasised by Foskett (1992a). Marketing and public relations management are clearly distinguished as processes within a wider external communications focus reflecting a different relationship between the school and its constituencies than the narrow customer-organisation relationship that exists in the commercial world. Many of the relationships in education are managed for the achievement of mutual, non-profit goals with an emphasis on partnership rather than exchange. Foskett suggests that ....

“....this idea of partnership characterises the relationship of schools with many of their external audiences. It is more appropriate to seek a wider, less jaundiced, term ..... (such as).... ‘external relations management’”

(Foskett (1992a): 6)

A number of key terms have emerged, therefore, which may be used in this area of management. Figure 2.3 attempts to clarify the relationship between these terms. The term “external relations” refers to the management of all external links for the institution, whether they are focused on the educational provision for pupils, or whether they are maintenance relationships which support these primary activities. In the latter grouping would be included relationships such as links with equipment suppliers which, while essential to the operation of the school, do not impinge directly on the school-pupil relationship but do so only in second phase activities. In many such relationships the school may be seen as client rather than provider. It is an amalgam of both provider and



**Figure 2.3 External relations, marketing, public relations, promotion and advertising as related concepts**

consumer, as well as including some relationships which are purely professional ones between equal partners in a non-competitive arena. These might include links with professional bodies such as teacher unions or subject professional organisations.

Marketing focuses on the management of relationships which are based on the concept of the school as 'supplier' in an exchange relationship. It is here that the semantic problems of the term 'marketing' emerge if precision in the concept is sought. The definitions of Kotler and Drucker in Figure 2.1, however, emphasise the management and implementation of a philosophy based on client-centredness.

The third term in the model is "public relations". It is convenient

here to use the definition of public relations offered by the Institute of Public Relations, which defines public relations as “.....the deliberate, planned and sustained effort to establish and maintain mutual understanding between an organisation and its public” (Baker (1991): 5). The emphasis here is on communications management, whether in an internally-generated, pro-active mode or whether in response to outside demands and pressures. This encompasses some of the marketing communications processes, but also relates to issues such as image management, press and media relations and internal communications. It is a key element in the implementation of a marketing philosophy. It is not, however, synonymous with the concept of marketing.

The fourth term in the model is “promotion”. This is a subset of both public relations and marketing. It is the planning and implementation of communications designed to draw the attention of the potential customer to the service on offer to persuade them to avail themselves of it, and subsumes the term ‘advertising’. It is encapsulated in the AIDA model (Davies and Scribbins (1985); Pardey (1991); Barnes (1993)) which suggests that the promotional process has four stages:-

- Gaining the potential customer’s attention
- Arousing their interest in the product or service
- Stimulating a desire to avail themselves of the advantages the service offers
- Prompting action to obtain the service or product

This process will include an expression of Ogilvy’s frequently maligned concept of the Unique Selling Proposition (Ogilvy (1963)), which highlights the distinctiveness of the product or service on offer and the clearly identifiable linked benefits of “purchase”. Promotion is, therefore, the process which connects the producer or supplier with the potential customer in the selling phase of the marketing process.

This section has considered the meaning of marketing in the context of education and has sought to develop a simple model of the key



terms in use - external relations, public relations, marketing and promotion. This distinction is important in the analysis of current marketing practice in schools which provides the main focus of this thesis.

## **2.5 A Marketing Approach for Schools - Positive Perspectives**

The growth in literature on marketing in schools has emanated largely from authors with a strongly-held view of the value of a marketing approach within the education sector (Gray (1991); Pardey (1991); Barnes (1993)). They identify a model of marketing which is appropriate to the educational world, which has characteristics which both derive from within education and which can enhance its effectiveness. Such a marketing perspective is.....

“.....one in which the interests and needs of the pupil or student as customer are central. Other clients - notably employers and parents - are also recognised and due attention is given to their concerns and needs.”

(Gray (1991): 27)

Gray suggests that, in essence, this marketing perspective will be characterised by:-

- a focus on “customers” (not just their wants, but also their needs), for “any organisation benefits from the careful examination of the needs of its clients and customers” (Gray (1991): 2) by recognising that those who use its services are customers with “needs, rights and expectations” (Gray (op. cit.): 2). Gray contends that “services such as the education service are particularly vulnerable when they fail to listen to their customers” ((op cit): 2)
- ensuring the activities and behaviour of the organisation’s employees are directed towards this focus. This will involve appropriate staff development, a process described by Robinson and Long (1988) as “internal marketing”
- the establishment of appropriate organisation and management to:-

- a) Identify customer wants and needs
  - b) Recruit sufficient customers
  - c) Apply quality control and quality assurance methods
  - d) To review output measures such as customer satisfaction
- a focus on the corporate image of the institution emphasising its service quality

The curriculum benefits of a marketing perspective have been considered by other writers. Williams (1989a) identified some of the positive curricular outcomes of a “client-focused approach”. Although he recognises that “policies in current legislation (are) not explicitly designed for this purpose”, he suggests that.....

“...market place priorities will inevitably influence the style, organisation and delivery of the learning processes for pupils (.....as.....) perceptions of schools as custodial institutions concerned exclusively with pedagogy and constrained within self-serving subcultures (are) displaced by recent conceptualisations of schools as centres for self-disciplined, individual and group learning activities, sometimes on inter-generational patterns. (This may produce) a fusion of intention, purpose and achievement of objectives among both providers and learners”

(Williams (1989a): 22)

These approaches may be regarded as individually sustainable and valid, but are brought together in two key concepts - those of external relations management and total quality management. Foskett (1992a) has considered the concept of external relations as being one which effectively encompasses both the marketing challenges for schools and the broader management of relations outside the school which may be collegial and partnership based rather than competitive. In fact it is impossible in practice and implementation to segregate the processes at work in the competitive and non-competitive environments since they overlap and also affect each other.

The issue of “quality” has become a central concern in education within the last decade, and has spawned a substantial literature (West-Burnham (1992); Murgatroyd and Morgan (1993); Bowring-Carr and West-Burnham (1994); West-Burnham (1994)). ‘Total quality’ is regarded as.....

“All aspects of the organisation (are).....dedicated to the goal of achieving the highest possible standards of performance as required by their customers (internal or external)”

(West-Burnham (1994): 171)

with a key feature that.....

“.....it focuses all aspects of management on its core purpose - the provision of appropriate services and products to customers”

(West-Burnham (1994): 171)

The emphasis on a customer focus in Total Quality Management (TQM) has a clear linkage with the definitions of marketing outlined earlier in this chapter. The pursuit of quality is a less contentious idea than the development of a marketing perspective, yet “TQM provides a framework.....for the development of market-driven effective quality schooling” (Murgatroyd and Morgan (1993): xii-xiii). Marketing might, indeed be regarded as a metaphor for a quality-driven education service. This reflects Gray’s perspective on the acceptability of the marketing concept in education. Gray (1991) suggests that the perception of marketing held by most educational organisations in the United Kingdom is that of recruiting additional pupils or students. He criticises this “crude input-based market system that focuses attention on the recruitment of students” (p9), and goes on to suggest an alternative market model....

“Other countries ( eg the Netherlands) have developed more sophisticated output-based approaches, which switch attention to the successful completion of programmes by students.(....) In marketing terms, recruitment becomes less important than retention and customer satisfaction in an output-based system”

(Gray (1991): 9)

It is suggested here, therefore, that a quality management perspective provides an appropriate vehicle and *raison d'être* for the development of a marketing approach in schools. Murgatroyd and Morgan (1993) indicate that "it is very early days for TQM in schools....although there are some TQM pioneers working in Britain, Canada and the USA" (p xii). The case studies within this thesis will reveal how far the linkage between quality and marketing is being addressed.

## **2.6 Summary**

This chapter has examined the concepts of the market in education and the nature of marketing as a management function. The components of a market have been identified as choice, diversity and differentiation, competition, an exchange mechanism, and an appropriate organisation for institutions in the market place, the organisation of these elements within education being in the form of a quasi-market rather than a free market. Objections to a market model have been identified in terms of the double-bind of market legislation, the problematical view of parents as consumers, issues of egalitarianism, teachers views of marketing, and the potential impact of a market system on the quality of educational provision.

The concept of marketing has been considered to emphasise the 'client-focused' meaning of the term, and the range of terminology relating to marketing has been presented in terms of a simple model (Figure 2.3). The concept is seen as having value to schools in relation to its emphasis on quality and customer satisfaction, with their linkages to the ideas of total quality management.

The following chapters consider the organisational structures that might be adopted within educational institutions for the management of marketing (Chapter 3) and the empirical evidence on the practice of marketing in schools (Chapter 4).



**CHAPTER  
3**

**The Planning and Management of Marketing in Schools -  
Theoretical Perspectives**

## Chapter 3

### The Planning and Management of Marketing in Schools - Theoretical Perspectives

#### **3.1 Introduction**

The marketisation of education raises many questions about the management of schools, and one of the key research questions within this thesis relates to the organisational structures within schools and the operational and planning approaches which have been adopted by them for marketing. To contextualise this analysis Chapter 3 considers the existing theoretical perspectives in these fields and identifies a number of approaches to operational planning (Section 3.2) and a range of potential organisational structures (Section 3.3), both in the specific context of marketing and in relation to broader management issues. The importance of considering these approaches and structures as responses to externally-imposed change is emphasised by the subsequent reflection on the 'policy process' at the macro scale and on its micro scale implications (Section 3.4).

This analysis requires the assembly of ideas from a range of disparate sources, for there exists no corpus of education management theory specifically in this field. In an environment where experience of marketing is rather limited and has a relatively short history it is difficult to identify models of operation that are derived from practice. The adaptation of schools to the "new" environment is young even at the date of this thesis. At the time of publication of the majority of new texts on school marketing in 1991(eg Gray (1991)) the models represent thinking dating from some two years previously (allowing for publication production times). It is reasonable to assume, therefore, that they are inductive in nature, derived from an interpretation of existing general education management models (eg Bush (1986)). Alternatively, some will represent translations of models that operate in other education sectors which have engaged in marketing for a longer period than schools, for example the further education sector

(eg Davies and Scribbins (1985)) or the higher education sector (eg Keen and Greenall (1987))

## **3.2 Operational Planning Models**

### **3.2.1 Rational v Non-Rational Planning**

The late 1980s and early 1990s has been a period of growth for the concept of rational development planning within education. Stimulated by the research and ideas of Hargreaves et al (1989) the pressure to place the management of all the activities of schools into a framework of institutional plans has been strong, backed by the direction of local education authorities (Hargreaves et al (1990); Hargreaves and Hopkins (1991). The development of a Marketing Plan within a broader Institutional Plan appears a logical and constructive approach to dealing with the issues of marketisation within schools. It matches also the views that Bowe, Ball and Gold (1992) ascribe to senior managers in the schools in "Riverway" and "Westway" LEAs (see Chapter 4), that...

"...senior managers hold a strong belief in applied rationality, a commitment to the power of logic. That is the view that if only they could get the systems in place and structures 'right' then everything else will fall into place" (p 157)

However, it is clear that such rationality is difficult within the rapidly changing environment of schools. Gray (1991) suggests that totally rational planning approaches might only work where "pure" market forces operate, and because "the future is an "ill-structured" problem, so that rigorous and 'rational' modes of investigation are not necessarily appropriate" (Gray (1991): 47).

If "pure" market forces are a pre-requisite for rational planning then it is clear that even the commercial world may have problems with using such approaches. McDonald (1989) has indicated that there is no correlation between the careful development of a marketing plan in a

business and the success of marketing. While there are clearly many possible reasons for this, including ineffective use of an essentially sound approach, he believes that it is due to the difficulties of predicting interventions in the market.

Instead, the use of 'non-rational' or 'political' approaches, which assume a high degree of instability and change may be more appropriate. Intuition, instinct, imagination and what Gray calls the "art of conjecture" (Gray (1991): 47) may be the 'skills' most appropriate within this environment, including approaches such as 'mind games', creative thinking strategies, role play, scenario building and 'Delphi' methods.

Despite these issues about the nature of the planning methodology, there is general agreement on the importance of planning to school management (eg Hargreaves and Hopkins(1992)). It is not clear, however, how far the planning approach has begun to extend beyond curriculum and financial planning into the spheres of marketing and public relations activities. Williams emphasises this point:-

"It is inconceivable that schools should not have planned their curricular programmes and it should be equally unacceptable that their public relations policies and programmes should be unplanned and communications networks with their external publics left to casual, ad hoc arrangements. The reality is that relatively few schools have policies or planned procedures for contact with their publics other than with governors and parents"

(Williams (1989a): 18)

The development of planning models will be considered below.

### **3.2.2 Strategic Planning and Planning for Marketing**

A number of models have been proposed for the planning of marketing and external relations activities in schools. Most of the earlier approaches were sequential, stage based models, that focus only on the



marketing or public relations function with little or no reference to wider institutional planning, and simplistic structures. The models include those outlined by Devlin (1989), Gray (1989), and Marland and Rogers (1991).

Williams (1989a) model, for example, characterised external relations planning as a simple four stage process, although Williams recognised that “some stages overlap and are concurrent in application” (Williams (1989a): 30):-

- Stage 1. Building an adequate knowledge of the schools publics. This was seen as an essential pre-requisite by identifying those issues which people beyond the school have strong views about, and the levels of understanding that exist about the school and its functions.
- Stage 2. Establishment of a Planning Task Group. This group represents a wide range of internal and external groups and has a role of both consulting and planning.
- Stage 3. Development of Strategy. This stage involved a “consideration of the ways in which various communication processes will be used to achieve the school’s public relations objectives” (Williams (1989a): 31), although it is not clear from Williams how these objectives will have been identified or which communication processes might be considered.
- Stage 4. Evaluation. Williams suggests that evaluation is an essential process in monitoring the “progress in relationships” that develops.

Later models seek to address some of the inadequacies of such simple approaches, and attempt to integrate the planning of marketing with institutional planning. They propose a planning process which is customer-focused, quality-driven and responsive, which reflects recent thinking on planning in both business and public services (Marsh (1993)). Strategic planning in organisations involves....

“ .....defining the organisation's mission and developing methods and strategies to achieve that mission in the most effective way possible”

(O'Brien (1991): 164))

Hanson and Henry (1992) suggest that in all organisations a marketing strategy is an essential component of such a strategic planning process, in that marketing is the process of communicating mission and generating the change in relationships with external constituencies which are necessary to achieve the mission. In the context of education they suggest that.....

“If strategic planning enables an educational system to envision its future, then strategic marketing is the communication technology used by the managers to link the realities of the present with the expectations of the future”

(Hanson and Henry (1992): 257-258)

Two such integrated approaches to planning will be considered here.

Lynton Gray (1991) sees the planning process as designed to ensure that the needs of pupils and other stakeholders in the education service can be met as effectively and as efficiently as resources allow, and indicates that.....

“Until recently, many institutions got by largely on improvisation, within a very loose planning framework”

but

“Central government policy initiatives require a school planning response - even when the intentions are to subvert and modify those aspects of....policy which are perceived .....to be not in the best interests of the customers”

(Gray (1991): 40)

It is ironic that subversion of government policy in practice is cited as one of the techniques for achieving the clear goal of government philosophy which is the customer-focused market.

Gray's planning model is illustrated in Figure 3.1. Figure 3.1(a) (Gray (1991): 44) shows five key stages, and is derived from the planning

*Stage 1: Review* – ‘What have we done so far?’

Planning starts with some review of what has been done so far, and what needs to be done next. A critical look can thus be taken at current targets and intentions, and the extent to which they are being achieved

*Stage 2: Analysis* – ‘How well do we think we are doing?’

At this stage, the outcomes from the review processes should be considered alongside agreed institutional policies, LEA and national policy requirements and other initiatives, and an assessment of the institution’s capabilities

*Stage 3: Planning* – ‘What should we do next, how and when?’

The intention should be to produce a valuable working document essential to the effective operation of the organization.

*Stage 4: Implementation/monitoring* – ‘Are we doing what we agreed to do?’

The plan will normally include an action sheet, which spells out who should do what by when, and provides a means for checking whether the agreed plan is being implemented as agreed. It should also spell out whose responsibility it is to undertake this monitoring.

*Stage 5: Evaluation* – ‘Have we achieved our objectives?’ and ‘What should we do next?’

This is an ongoing activity, but is likely to be focused towards specific requirements, such as:

- the annual Governors’ Report
- the annual LEA and DES planning requirements
- the annual budget and quarterly reviews
- the annual National Curriculum development plans
- the preparation of the next year’s plan

### **Figure 3.1a A planning model for marketing (Gray (1991))**

1. *Mission statement and objectives*: what the institution is trying to do and where it is going
2. *Situational analysis*: Statement of the current situation, spelling out the current strengths and weaknesses of the institution internally, and the opportunities and threats externally, together with the extent to which the institution is achieving its agreed objectives
3. *Planning elements*:
  - Resources: annual budget – income and expenditure forecasts related to previous year; premises plan; capital expenditure programme.
  - Curriculum: plans for reviewing current course provision; and implementing and supporting new courses
  - Staff deployment and training: staffing plan, including deployment, succession and other personnel management elements; staff development and training plan
  - Marketing: marketing plan with objectives, SWOT analysis, marketing mix and strategies
4. *Management and organization*: Management responsibilities/ deployment and changes; operation of planning systems; internal structures and their links with other organizations (including business and community). Organizational structures
5. *Monitoring and evaluation*: Financial controls; performance indicators and their uses; reporting procedures to governing body and externally (including LEA/DES where appropriate); teacher appraisal and student assessment systems; staff and student (and employers/parents where appropriate) evaluation procedures

### **Figure 3.1b Components of an institutional plan (Gray (1991))**

- 
1. Executive summary and action sheet
  2. Situation analysis:
    - Internal profile
    - External environment
    - Resource audit
    - Current strategiesemphasizing: (a) key threats and opportunities, (b) market segmentation and (c) course and other services portfolio and life-cycles
  3. Objectives and targets:
    - Mission statement
    - Agreed/projected future routes and destinations
    - Objectives for selected market segments
  4. Marketing strategies:
    - Target markets: trends, segment characteristics
    - Marketing mix: product, place, price, promotion, people
    - Resource implications, including income or surplus income targets; staffing requirements
    - Organizational implications, including responsibilities, deadlines and delivery structures
  5. Action programmes:
    - Tactics
      - what is to be done?
      - by whom – responsible to whom?
      - by when?
      - using what resources? including staff, budgets
      - what promotional materials/campaigns?
    - Evaluation and review
      - performance indicators
      - marketing research facilities and related resources
      - tactics for steering action programmes, including contingency plans
- 

**Figure 3.1c Components of a marketing plan (Gray (1991))**

model proposed for school development planning by Hargreaves et al (1990). Although set out in linear form the sequence from review to analysis to planning to implementation / monitoring and evaluation is, in reality a planning cycle since the process is unlikely to be a single event and the evaluation will feed into the review stage. This process is seen as leading to the production of the institutional plan, whose key components are illustrated in Figure 3.1(b) (Gray (1991): 43). A number of key issues related to the position of marketing in this process might be identified:-

- The whole plan is seen as deriving from the mission of the institution. If a marketing perspective is to be integrated into the plan then this must in some way reflect a part of the mission. Marketing is not, therefore, seen as a process servicing the plan but a philosophy that underpins the plan.

- Four key components or planning elements are identified - resources, curriculum, staffing and marketing. There is a suggestion here, as in many earlier summaries of management tasks in schools (eg Ballinger (1986)), that marketing is an additional function rather than an integrating or permeating function. These four elements are not independent, of course, but the approach to marketing that is adopted will give some idea of whether one of the other three has priority in planning.
- The organisational structure derives from the plan and does not drive the plan. This has real implications for schools adopting a marketing perspective and the organisational structure may therefore be an indicator of the view of marketing that the school has.
- Each of the planning elements in the institutional plan has its own strategic plan. Figure 3.1(c) (Gray (1991): 45) shows Gray's view of what the components of the marketing plan will be, and makes clear reference to many of the techniques and approaches which are characteristic of planning and analysis in the field of marketing eg internal and resource audits, SWOT analysis, market segmentation analysis, market trend analysis and the identification of an appropriate marketing mix.

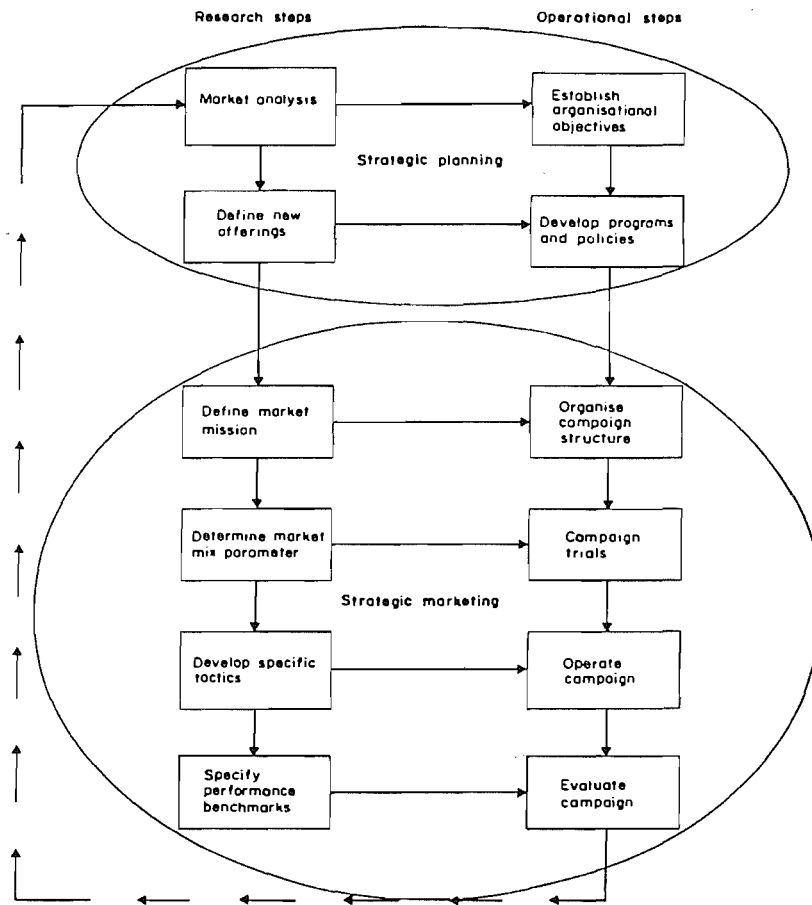
Overall, therefore, Gray's model presents a structured planning approach which integrates marketing analysis with institutional planning.

A second model is that proposed by Hanson and Henry (1992), who make an important distinction between 'strategic marketing' and 'project marketing'. Project marketing is "the most-practiced form of marketing" (Hanson and Henry (1992): 258) and deals with individual issues, that are of short-term significance and do not relate specifically to any long term strategic plan or mission. While each activity may achieve a specified short-term goal, Hanson and Henry suggest that.....

"...an effective program in educational marketing.....emerges out of a sequence of well-planned research and operational steps"

(Hanson and Henry (1992): 258)

Hanson and Henry's model of the strategic marketing planning



**Figure 3.2 The strategic marketing planning process (Hanson and Henry (1992))**

process is shown in Figure 3.2. It starts with market analysis, then proceeds to the establishment of goals, the choice of appropriate tactics and strategies, their implementation and their evaluation against specific indicators ("performance benchmarks").

Three facets of this planning model need specific comment. Firstly, it sees the development of marketing strategies as wholly integrated into the institutional planning process. Indeed, market analysis is seen as the first step in strategic planning for the whole organisation and feeds into the establishment of broad organisational objectives. It is neither a minor "add-on" component of planning, nor is it an important but second phase process in strategic planning.

Secondly, however, and as a balance to this assertion, it is not clear from the model how issues of resources and curriculum are integrated into the planning process. These must act, at a minimum, as moderators of the potential objectives that the market analysis might identify. It is reasonable to assume, also, that in parallel to the stages of strategic marketing (the lower section of their model) there will be strategic planning of curriculum, personnel and resources, which will inform and influence the planning within the strategic marketing area.

Thirdly, this model is helpful in clarifying the precise nature of a marketing perspective within an educational establishment. Hanson and Henry consider that the stage of market analysis in education can be performed by a needs assessment, where needs assessment is....

“...based on (a)...discrepancy view which identifies gaps between a given condition(what is) and a desired condition (should be) “

(Hanson and Henry (1992): 260)

Hanson and Henry suggest that there are three forms of assessment model:-

- The Expert model, in which those with proven relevant expertise from inside or beyond the school propose appropriate visions and solutions
- The Decision-maker model, in which those empowered within the school's senior management make their own professional judgments
- The Marketing Model, in which decisions reflect those needs and wants identified from within the local community.

If marketing is regarded as client and customer driven then a true marketing approach must encompass the third of these models. Schools may be willing to engage in a full range of marketing activities, but if the first or second of the models is used in needs assessment to the exclusion of the third, then it is not clear that a full marketing perspective is being adopted.

The models of Gray and of Hanson and Henry reflect more clearly the operational realities of schools than do the earlier models. By integrating marketing into whole-school planning they place the customer focus of marketing into the core of institutional management. The use of models which integrate marketing with wider institutional planning is seen as more helpful to the planning of marketing, and reflects recent ideas on strategic planning in both business and education (Marsh (1993); Caldwell and Spinks (1992)). In such models there is the clear view that organisational structures derive from strategic planning rather than driving it. Both models, of course, represent theoretical perspectives and are not supported (yet) by empirical evidence. A key focus of this study is an analysis of the nature and form of marketing planning in a range of schools.

### **3.3 Organisational Models**

#### **3.3.1 Introduction**

The literature on the structure and culture of organisations within and outside education is large (eg Bolman and Deal (1984); Handy (1990)). Educational organisations might be characterised individually by the particular combination of culture, structure and activities that may be found within them (O'Neill (1994)). Each of these three dimensions of an organisation is responsible in part for dictating the character of the other two, together with the institution's history, personnel, market place and external policy environment.

Within this study the focus will be upon organisational structure. This may be regarded as "...a description of what people do and how they relate; organisation structure is a grossly simplified description of jobs and relationships" (Gray (1988): 147). This reflects a view that organisational structure is not permanent and changes (perhaps slowly) to reflect internal and external cultural and process characteristics. It is, therefore, a mirror of the organisation, since "structure is created to distribute and co-ordinate



the work of people in the pursuit of organisational goals and objectives” (O’Neill (1994): 109). It is recognised, of course, that “formal structure may be poorly adapted to the actual on-going activity” (Meyer and Rowan (1988): 110), but an analysis of structure will provide useful insights into the development of marketisation.

There is clearly no single organisational model which is appropriate to the development of effective marketing in all schools, for the precise method of organisation will depend on a wide array of factors. These will include:- the specific skills of individuals in the organisation; the size of the school and its geographical location; the nature of the school’s mission and the vision of its governors and senior management; the marketing objectives; the resource priorities and limitations of the school; the political “structures” in the school and the location of power within those structures - particularly what Handy (1986) has termed “expert” power (power deriving from a particular talent or skill, perhaps in producing promotional materials in the context of marketing) and referent power (power achieved through popularity or charisma). A range of models is considered below, together with a perspective on the issue of staff development as part of organisational development.

### **3.3.2 Traditional School Organisational Models**

On the basis of subjective observation, Gray (1991) suggests that the model of organisation found in most schools is focused on roles and activities that existed prior to a pressure to develop a marketing culture. Such a model sees the headteacher taking direct responsibility for public relations and recruitment, with specific marketing responsibilities distributed amongst the “pastoral” staff. The Head of Year 7 in a secondary school, for example, might have responsibility for liaison with primary feeder schools and hence, de facto, a responsibility for pupil recruitment. Gray suggests that ....

“Budgets do not allow for specialist appointments at any level, and in consequence staff development in order to enhance marketing

skills is particularly important (in schools).”

(Gray (1991): 153)

This view of marketing and external relations organisation is echoed elsewhere. Williams (1989a), for example, suggests that.....

“It is now common for functions of considerable educational and managerial significance to be devolved to senior members of staff within schools. However, although there are noteworthy exceptions, functions linked with those external relations perceived as being of major importance to schools continue to be handled by Heads”

(Williams (1989a): 17)

This is seen by Williams as problematical, however, for “the tasks involved are too diverse and complex to rest with a single individual, however talented he or she may be” (Williams (1989): 20) and, therefore, “it is contended that one of the traditions which requires mutation is that external relations should be exclusively undertaken by the head teacher” (Williams (1989a): 20).

### **3.3.3 Organisational Models from Further Education**

Davies and Scribbins (1985) present two developing organisational models in the further and higher education sector which we might consider to have potential for application within the school sector. The first of these is referred to as the ‘sub-management model’, in which marketing functions are delegated to a relatively junior member of staff who works through a line management structure to a member of senior management. The advantage of this is seen to lie in the allocation of responsibility to an individual with clear expertise and interest who may be in more direct contact with “customers” on a day to day basis. The disadvantage lies in both the practical and political arenas. From a practical viewpoint it is unlikely that such a junior staff member will have authority for policy development or resource allocation, resource

management, or the deployment of staff and so senior staff will need to be involved at all stages of the tasks undertaken. More importantly, though, it gives clear indication of the status and view of marketing in the eyes of senior management.

The second model is referred to as the 'general and lieutenant's model'. This operates where a group of organisations (perhaps in a single LEA, from which the model in its original form is derived) share a common marketing approach with an individual outside each single organisation coordinating and directing activities. Within each individual organisation a member of staff ("the lieutenant") has responsibility for implementing delegated decisions from "the general" and for feeding up into consultation in the marketing structure the views and ideas of his/her own institution. The benefits of this derive from economies of scale and the lack of necessity for each institution to deploy substantial resources into marketing. The disadvantages relate to a lack of control within the organisation and the status and influence and authority of the "general". Since incorporation in post-16 colleges in 1993 this model will have disappeared from the further education sector, but with continuing LEA influence it may still exist within the schools sector.

### **3.3.4 The Marketing Manager Model**

Gray (1991) draws on experience in further and higher education to argue for the identification of a specific managerial role, probably at senior level in an educational organisation, with a responsibility for marketing, quality control and assurance and academic standards. This reflects a view that this is a specialist field with identifiable expertise, but which is also an "integrative" (Gray (1991): 151) role. Williams (1989a) foresaw the possibility of the appointment of "marketing managers" to posts associated with senior positions such as deputy heads, and that "holders of such appointments might not be qualified or experienced teachers but possess other required skills" (Williams (1989a): 21). Gray indicates that "educational managers with marketing responsibilities need an extensive portfolio of skills and techniques if they are to work effectively" (Gray

(1991): 154) and goes on to identify these as:-

- “A passionate concern for quality improvement and customers ” (p151)
- Skills in the techniques of marketing research
- The ability to recognise the perceptions of education that different stakeholders may have
- Organisational and general management skills
- Political awareness and political skills within and beyond the institution
- The ability to motivate and train colleagues in a marketing perspective
- Judgment

This list may be interpreted as a job description for the ideal educational manager, notwithstanding a specialism in marketing ! Amongst these, Gray suggests that the political skills are the most important, and Gray and Williams (1990) have indicated that, in further and higher education, marketing managers appear to perform poorly in institutional politics with a consequent impact upon their resource allocation. The present study will consider whether this model of organisation can be identified in schools.

### **3.3.5 Marketing Groups and Teams**

The development of teams is a product in many schools of the trend towards delegated and collaborative management (Belbin (1981); (1993); Trethowan (1985); Caldwell and Spinks (1988); (1992); Everard and Morris (1990); Bell (1992)). It is seen to bring benefits to the organisation of sharing expertise, optimising resource usage, motivating staff, improving communications, improving relationships, and realising the potential of individuals (Bell (1992)).

The importance of Task Groups or Marketing Groups is emphasised by many writers, although their constitution may vary. Williams (1989a) suggests the idea of a “Task Group” with members drawn from the school and the community. Devlin and Knight (1990) suggest that such a ‘public relations committee’ might comprise representatives of staff, senior

management, governors, PTA, school council, and other external groups for “they need to be an integral part of the school’s management and understood by the whole staff, governors, parents and students” (Devlin and Knight (1990): 109).

### **3.3.6 Staff Development and Internal Marketing**

Developing arenas of operation in most organisations often stimulate a recognition of training need. The importance of internal staff development as part of such an organisational model is stressed by many writers (Gray (1991); Davies and Scribbins (1985); Foskett (1992a)). This is in part a skill development exercise, in that many of the specific approaches of marketing and the analytical techniques which can be employed are new to those in education. It is also, though, about two other important areas - the development of a marketing culture in which each individual in the organisation is aware of their role within the activities of the school (e.g. ‘front of house’ training), and the sharing (and, often, development) of vision and mission that generates a sense of common purpose. Together these elements are referred to by Robinson and Long (1988) as “internal marketing”, and may be seen as both one of the earlier requirements for a school in the development of a marketing strategy and an activity that will be inherently more difficult than managing some of the external facets of a marketing programme (e.g. promotion) (Foskett (1992a)). The importance of raising the awareness of staff about their own role in external relations is well expressed by Williams (1989b).....

“What is needed....is a fostering of a reality that every teacher, as well as every pupil, is personally responsible for community perceptions of the school. The reputation of the school depends upon the aggregated attitudes and behaviours of every pupil and teacher. Not to acknowledge, accept and praise that sense of personal ownership of the school’s reputation through individual responsibilities of pupils and teachers is to deny that the school exists to serve its community...”

(Williams (1989b): 154-155)

As the tasks of managing the external relations of schools, including marketing, has grown it might be reasonable to assume that training has accompanied this. The traditional “top-down” approach to training in the education profession might indicate the growth of LEA sponsored training of heads and deputies for their new roles. However, this appears not to match reality. In 1989 Williams suggested that there was little provision of external relations elements in management training, whether provided by LEAs, higher education or the then Department of Education and Science:-

“It is...uncommon.....for heads to have received any realistic preparation for the complexities (of marketing and external relations).....(and) it is almost unknown for other teachers, at middle management level for example, to be trained for such responsibilities...”

(Williams (1989a): 20)

He goes on to emphasise the importance of these activities to good external relations, but suggests that.....

“.....it is comparatively rare for senior teachers in schools fully to acknowledge and develop strategies aimed at extending the understanding of school objectives and activities to other members of the staff in schools who may exert considerable influence in the building of a school's public image and the maintenance of its reputation in the community.”

(Williams (1989a): 17)

It may be suggested, therefore, that staff development for marketing is still “terra incognita” in most schools.

### 3.4 Policy and Organisational Responses

The dynamism of educational organisations and their management is a response in large measure to the changing policy environment within which schools operate. In the context of this study marketisation is seen as very substantially an externally-imposed change for schools. To understand the response of schools it is necessary, therefore, to examine the theoretical perspectives on policy impact and implementation in the micro-political arena that is the school and its management.

The way in which policy generated from the political control centres is implemented in schools has been an active area of research (eg Ball (1987); (1990); Alford and Friedland (1988); Dale (1989); Gleeson (1989)). These analyse the process in two different frameworks, the linear models (eg Dale (1989)) and the heuristic models (eg Bowe, Ball and Gold (1992)).

The linear models see the policy process as a simple route between policy generation and policy implementation where policy “gets done to people by a chain of implementors whose roles are clearly defined” (Bowe, Ball and Gold (1992): 7). The policy process in the United Kingdom since 1979 has frequently been interpreted as being of this form (eg Dale (1989)), but Bowe, Ball and Gold (1992) contend that such a model of linear policy implementation is not a true reflection of reality, that there is not “an unequivocal governmental position which will filter down through the quasi-state bodies and into the schools” (p 10). They contend that there are many opportunities between the development of educational policy and its implementation for interpretation of its meaning. Thus, ...

“The translation of educational policy into legislation produces a key text (the Act). This in turn becomes a ‘working document’ for politicians, teachers, the unions and the bodies charged with responsibility for ‘implementing’ the legislation” (p 10)

The interpretation and reading of such policy texts raises issues of

clarity of language and meaning, intentional and unintentional ambiguity in the text and the political and social analysis which every reader will apply to it - as Codd (1988) indicates.....

“For any text, a plurality of readers must necessarily produce a plurality of readings”

(p239)

This persuades the authors that policy should be seen as:-

- a discourse, with a range of interpretations in terms of possible implementation mechanisms and routes, the constraints within the document, an interpretation of the contradictions within it and reading of clear gaps, omissions or spaces
- an “operational statement of values” (p13), or a view of how the world should be
- an area to be contested by those implementing policy, who must resolve inherent conflicts between current practice, their interpretation of policy and their own and their school’s values

The heuristic model of the policy process arises from this critique. Bowe, Ball and Gold (1992) suggest that policy emerges from three contexts, each of which is a dynamic “arena of action”. The “context of influence” is the arena of public policy debate in and around the political parties and government, together with representative groups and national bodies. The “context of policy text production” represents the formal articulation of policy through a range of media, but usually through text. The third context is the “context of practice” where;-

“...policy is not simply received and implemented (but) is subject to interpretation and is then ‘re-created’ ..... . Practitioners do not confront policy texts as naive readers, they come with histories, with experience, with values and purposes of their own, they have vested interests in the meaning of policy.” (p 22)



The commencement of the implementation of policy is therefore a point of departure for micro-political conflict within the school. "Active processes of accommodation and mediation" (Ball and Bowe (1991: 23) are seen as characteristics of the interaction between managers in schools and the policy documents they receive, and also between individuals and groups of staff within the broad school community. Ball (1987) has indicated that, for externally-initiated changes....

"....their acceptance and their implementation become the site as well as the stake of internal dispute."

(Ball (1987): 263)

This idea supports clearly the views of Moran (1989) who argues that the creation of legislation and policy at government level should not necessarily be seen by those working in schools as the inevitable precursor of their professional role. He asserts that "the local outcome of a distant intent is conditioned more by local circumstance than by remote control" (Moran (1989): 87) and that "a potentially hostile measure can be redirected into a productive outcome" (p 87). This implementation of externally-imposed policy in schools may generate a range of responses in schools. Saunders (1985), for example, has identified three response models:-

- Adaptive extension, where the concept or policy is taken strongly into the culture of the school with a vision that reflects clearly the original policy intent
- Accommodation, where the policy is interpreted and adjusted to simply fit the existing modus operandi
- Containment, where the policy is absorbed by the existing school pattern.

The precise nature of this response will depend, of course, upon the outcome of the micro-political contests that follow its entrance into policy dialogue in the school. It will be demonstrated in the organisational structures that schools begin to develop and also in their management processes that can be observed.

An important consideration in the pattern of response is the issue of 'incipient acculturation'. Schools are dynamic organisations in both curriculum and management terms, with periods of stability and periods of rapid re-organisation, in response to many external influences. Policy and its resulting legislation at national level is only one of the many influences on school culture that can be identified and many other factors may play a part.

The predominant national political philosophy of any era affects all aspects of the society in which it exists, and so it is possible to identify two routes by which that philosophy might affect schools. The direct route, through legislation, has already been considered. The indirect route involves the effects of change outside education. In particular, those who work in education and those who are consumers of education will be affected by changing social and economic mores and their view of the role of education and their own relationship with it may change. Of importance in developing a market focus in education in England and Wales in the period since 1979 has been the generation of the idea of the "enterprise culture" as a central tenet of Conservative party thinking. Demonstrated in a radical programme of economic and institutional reform, this philosophy "has apparently been supplemented by, or at least partly redefined as, one of cultural reconstruction - the attempt to transform Britain into an 'enterprise culture'" (Keat (1991): 1).

While this cultural adaptation is clearly not universally accepted at the level of individuals, there will be those in schools as elsewhere who will have either assumed the philosophy voluntarily, seen this as an opportunity to express long held beliefs or simply unknowingly absorbed the dominant theme of the political culture. They will themselves be a positive catalyst to organisational change in schools towards a market view. In addition to those within the system, the market culture has tended to give access to positions of policy influence in schools to many individuals supporting the new order - industrial governors, bursars, marketing managers and parent governors with a vested interest in

pressing the claims of a customer-focused approach in schools. Hence, a process of incipient acculturation may be a strong catalytic force in the responses of schools to policy choice from outside.

### **3.5 Summary**

This chapter has considered a range of theoretical perspectives relevant to the planning and management of marketing in schools. In the theoretical arena of institutional planning the dominance of rational as opposed to non-rational planning has been noted, and a distinction drawn between simple, non-integrated models of marketing planning (eg Williams (1989a) and models that integrate marketing into strategic planning (eg Hanson and Henry (1992)). The nature of a range of organisational structure models has been described, since these are seen to reflect organisational response to change. These include traditional school-based structures, imported ideas from further and higher education, and new structures focused on marketing managers and marketing teams. The staff development issues surrounding organisational change have been identified as an area lacking management attention. Finally, the nature of the school's response to external policy change has been examined with a recognition that policy is mediated by local interpretation and environmental factors, and catalysed in part by incipient acculturation.

From this theoretical perspective, Chapter 4 will examine the existing research in the field of the development of marketing by schools.



**CHAPTER  
4**

**The Planning and Management of Marketing in Schools -  
An Empirical Perspective**

## **Chapter 4**

### **The Planning and Management of Marketing in Schools - The Empirical Perspective**

#### **4.1 Introduction**

The field of educational marketing has a short history within the wider field of educational research, and the existing literature is dominated by a theoretical perspective (eg Gray (1991)), with few, sporadic references to marketing as part of wider studies of education management (eg Weindling and Earley (1987)). The academic discourse has focused on the validity of the market concept within education (eg Edwards and Whitty (1992); Thomas (1994)), and on 'demand side' issues, particularly on the idea and nature of parental choice (eg Bowe, Ball and Gewirtz (1994)). In the field of 'supply side' study the growth of publications in the early 1990s contributed little to the empirical basis of the study of marketing in schools (eg Marland and Rogers (1991)), drawing largely on anecdotal evidence and business theoretical perspectives to inform the practical guidance provided. This chapter seeks to review the empirical evidence relating to the 'supply side' of the secondary school market place in three broad areas - the contribution of anecdotal accounts as a search for grounded theory (Section 4.2), the insights of early research studies (Section 4.3) and the evidence from more recent studies (Section 4.4).

#### **4.2 Grounded Theory Perspectives**

Accounts of the impact of the development of the 'new culture' in secondary schools are to be found in most of the 'marketing schools' texts that have appeared in the period since 1988 (eg Devlin and Knight (1990); Gray (1991); Marland and Rogers (1991); Davies and Ellison (1991)). However, most of the evidence is anecdotal in nature or represents a description of the operation of a single school in one specific facet of marketing activity. In this form it represents the pursuit of 'grounded theory' (Glaser and Strauss (1967)), which is the development of concepts and

theories from emerging empirical evidence rather than the testing of advance hypotheses.

The evidence from anecdote is typified by the account of developments provided by Gray (1991), who suggests that “a number of trends and developments can be spotted” (p 9), despite also indicating that

“the scale and nature of the education system makes it difficult to generalise about how individual institutions.....have responded to the pressures and changes....” (p9).

His account of change makes reference to increasing useage of prospectus materials, a rise in the involvement of parents in primary school classrooms, the improvement in the reception areas and signposting in primary schools, and the use of the creative display of pupil and teacher work to enhance the quality of the environment in both secondary and primary schools. From this evidence Gray goes on to provide a positive and optimistic but unsubstantiated view of the role and future of marketing in education:-

“ .....the recognition that schools .....need to employ marketing strategies if they are to survive and flourish is now found in all education sectors and in most institutions. In other words, the awareness of marketing as a force for good is there. What is not yet well developed is a clear view of the most effective ways in which educational marketing might be undertaken.”

(Gray (1991): 11)

The descriptive approach is typified by Davies and Ellison (1991) who use an example of a comprehensive school to illustrate ‘good practice’ in prospectus design (Davies and Ellison (1991): 93-108). No reference to a research methodology is made, however, nor is there a discussion of an appropriate theoretical framework to establish that the practice is indeed ‘good’.

It must be accepted that these represent an analysis of observations by highly-regarded educationists with many years of practical experience in the environment of educational management and / or marketing. The perspectives have a clear value as a starting point for analysis, and would include perceptions shared by many others. It is, nonetheless, a subjective assessment and in essence describes a list of hypotheses to be tested, an outline research agenda for future enquiry. It provides a range of grounded theory perspectives that later studies, such as the current one, might investigate.

#### **4.3 Early Studies in External Relations Management**

The earliest empirical evidence that might be seen as relevant to the current market context emanates from broad-scale studies of education management. These address the significance of marketing in schools during the 1980s and the perceptions that headteachers have of their boundary role. They reflect, therefore, a different political and management context than the contemporary situation, but provide some useful insights into early thinking on organisational responses.

Research into what Williams (1989a) terms the “boundary role of heads” has been mostly North American based where the concept of marketing and public relations management is of much longer foundation than in the United Kingdom. Mann (1976) identified three distinctive approaches used by school principals in representing their schools to the community:-

- The “trustee” approach, in which the principal’s educational and professional leadership is recognised by the community. This perhaps reflects the traditional view of the headteacher in British schools
- The “delegate” approach is one in which the principal believes the school should be substantially responsive to the expressed desires, interests and wishes of its community. This might be interpreted as the most community-focused form of relationship which recognises the real educational benefits

of such community links, as expressed by, for example, Watts (1980). Equally, it might be seen as a highly marketised school that is client focused in the way it operates. The key difference must lie in the philosophical motivation for the strategy that is adopted.

- The “politico” approach is one in which both the trustee and delegate strategies are used as deemed appropriate by the principal. Crowson and Porter-Gehrie (1981) suggest from their research that this strategy is designed to indicate to the external constituencies that the school is highly community-focused while emphasising to those within the school the autonomy and professional nature of their educational judgments. In this way the positional authority of the principal is maintained in both internal and external environments.

Studies in the United Kingdom have not investigated this view of external relations management in any coherent way, but studies focusing on the micro-political arena of schools (eg Ball (1987); Bowe, Ball and Gold (1992)) show that it is the politico model which operates in many schools. Williams (1989a) suggests that many heads “are already skilled practitioners in this approach” (p 19), but also suggests that in some schools this approach has led to either a deterioration of community links or the “compromise of central educational values leading to de-professionalisation of both teachers and teaching” (p19) - or both ! Hall, Mackay and Morgan (1986) have shown that the perception of the head about her / his own role is of considerable importance in determining the nature of the relationship that the school has with its external constituencies. Where the head sees such external links as a duty rather than a key function the “community” tends to adopt a more distant and less positive attitude towards the school and its activities. The dominance of this negative view by headteachers was demonstrated by Jones (1987), whose survey of 400 secondary headteachers suggested that they gave low priority to external relations management, regarding much of the external community as “interfering and / or amateur nuisances who detract from the head’s autonomy” (Jones (1987): 60). Jones concludes that.....



“Heads seem to see their needs in terms of internal survival skills rather than in terms of their important role as mediator of the external relations of the school”

(Jones (1987): 61)

This view was extended by the research of Weindling and Earley (1987) into the experiences of headteachers in their first few years in post. The study was broad-ranging in its analysis of the management role of headteachers, but demonstrated a number of clear issues in the management of marketing. Two main conclusions were reached with regard to marketing.

Firstly, overall, headteachers did not regard external relations management issues as presenting significant problems to them. The only aspect which was seen as problematic was that of “creating a better public image of the school”. This concern was shared by most heads, whether very new in post (0-3 years experience) or a little more established (3-8 years experience), yet there was a clear contrast between the views of heads in rural and urban schools. Those in urban areas clearly saw the management of public image as a much more serious issue than those in rural schools, which may well reflect the reality of competition where catchment areas are small, transport is relatively easy and competition from independent schools is generally stronger.

Secondly, heads were aware of the need for good public relations, and the need to promote the school’s image, but saw this only partly in terms of pupil recruitment. It was seen as more important in terms of facilitating the everyday work of the school by enhancing external relationships, and also as a mechanism for enhancing staff morale.

These observations of a developing interest in the broad field of external relations management show an awareness of many issues which would now be regarded as crucial to schools, yet reflect a very limited recognition of them as marketing issues. Williams (1989a) suggests that they represent a protectionist and defensive view of external relations and

marketing rather than an early indication of the growth of a full marketing culture, for.....

“.....they are not rooted in perceptions that are genuinely focused on ‘client concern’ (but) .....reflect a recent shift towards overt accountability and a reciprocal protection of the school’s territory so that external influences can be kept under the control of the school’s own professional and administrative judgment”

(Williams (1989a): 15)

#### **4.4 Empirical Studies in the post-Education Reform Act Period**

Ball and Bowe have undertaken an ethnographically-based linear case study in two small LEAs referred to as Westway and Riverway (Ball and Bowe (1991); Bowe, Ball and Gold (1992)). Westway, a Labour controlled LEA, has 14 secondary schools, with the case study focusing on Flightpath and Parkside Schools, both of which are 11-18 mixed comprehensive schools. Riverway is a Liberal Democrat controlled LEA with eight secondary schools and a tertiary college. The two case study schools here were a mixed 11-16 comprehensive school (Overbury) and the only 11-16 girls comprehensive school in the LEA (Pankhurst).

The research was an attempt to observe the nature and impact of change in the schools in response to the Education Reform Act, with particular focus on the way in which government policy is implemented. The project began in early 1989 and was still continuing in 1991 and so provides “ a sense of change over time” (Bowe, Ball and Gold (1992): 3). Data collection was by means of interviews with senior teachers, school governors and teachers, LEA officers and advisers, together with observations of governors meetings, and meetings of the senior management and departmental teams. The research identified a number of important ideas that are relevant in the context of the present study, and these will be considered in relation to three broad areas - the nature of the school market; organisational responses to marketisation; and cultural responses to marketisation.

The nature of the market in Westway and Riverway demonstrates two important ideas. Firstly, Bowe et al emphasise the importance of the "local history of education markets" (1992: 37). In Westway, for example, there is a surplus of secondary places but as yet no steps have been taken by the LEA to close one of the schools. This may reflect the unwillingness of local politicians to alienate a particular group of parents (electors). It means that there is real opportunity for competition between schools in the LEA since most have space to expand their roll.

In Riverway some 20-26% of parents place their children in independent schools but this has been more than compensated for by the fact that some 30% of pupils in the LEAs schools come from outside its boundaries. It is clear that a climate of competition and market awareness pre-dates the 1988 Education Reform Act, and the LEA has actively promoted state education in the locality on behalf of its schools. This responsibility is now passing to the individual schools since the Education Reform Act, and it is not clear how far their resources and expertise will be able to deal with this challenge.

Secondly, the schools in Riverway demonstrate what Bowe et al term "micro-markets" (see Chapter 2). Pankhurst School, for example, has a large catchment because its character as a single sex school attracts parents over a wider area. It competes against the independent sector for single sex education, but is regarded by its head as being most parents second choice in this market. Its large catchment makes it cosmopolitan -it draws in, for example significant numbers of Asian girls from a wide area- and the role of transport networks in its ability to bring in pupils is of some importance. Flightpath, however, is very much a local school. It competes with two other mixed comprehensive schools in its own part of the LEA area, and the parents in its catchment seem resistant to making their children travel further than necessary to school. Its market is therefore much more focused than that of Pankhurst.

School reputation is an important element in this micro-market.

Pankhurst School, in Riverway, is perceived as being middle class yet cosmopolitan with good examination results which is deemed to be attractive to parents in the “single sex” market. Flightpath, however, is the largest school in the LEA which acts as a deterrent for some parents, and has a long-standing reputation for poor academic results and behaviour and a reputation for being the target of right wing racist elements in the community, a factor which deters Asian parents from choosing the school.

The organisational response to marketisation is considered here in terms of planning, structures, and the development of marketing strategies. In the area of planning and management processes Bowe, Ball and Gold suggest that the “new management” style of the 1980s and 1990s appears to be characterised by a number of features. It is increasingly task focused, with a resistance to the interference of the “personal” dimension in achieving goals. There is a clear belief in the importance and success of logic and rationality in approaching management issues, an idea reinforced by the adoption of the language of business and commerce. This, however, may simply be acting as a raft of hope in a sea of massive and at times incoherent institutional change, for the application of a logical / rational approach depends on having some clear vision of the future and access to adequate, accurate planning information. Bowe, Ball and Gold (1992) suggest that...

“...in a context which is increasingly complex, ambiguous and disordered it may be that the language of management and rationality perform a symbolic function”

(p179)

The rapidity of change that characterises the management scene at present suggests this may be a pious hope, and Bowe, Ball and Gold’s observations in Riverway and Westway lead them to conclude that....

“We would want to underline the role of ad hockery and muddling through”

(Bowe, Ball and Gold (1992): 172)

Decision-making is increasingly demanding of time, technical financial knowledge and negotiation with outside (and inside) groups, and so falls increasingly on the shoulders of the SMT. Devolution of decision-making is seen as simply generating bureaucracy in a system where resource constraints cannot support it. In addition, financial arguments have to be set against the professional judgment of teachers leaving no sense of self-determination amongst most teachers. The end result of this is that, although more democratic and devolved systems might emerge later on, in the short term there has been a strong move .....

“.....away from the new management styles of post-Fordism and back towards technocratic, hierarchical managerial styles”

(Bowe, Ball and Gold (1992):70)

Three possible future organisational outcomes of the new environment were identified as logical outcomes of change by the senior staff in the case study schools. Firstly, as Bowe et al (1992) suggest, .....

“While the management techniques of business may hold some attraction, the discipline of the market does not” (p154)

For this reason heads (for example the head of Overbury School) see some pressure to bring in business and finance managers not necessarily from an educational background to release them and their deputies to focus on the educational dimensions of the management process. A second model is the one that is seen in most of the schools in the case study (eg Parkside) where the head provides the leadership but delegates the responsibility for the administrative and functional management to deputies with well-defined roles, and retains the curriculum leadership role for himself / herself. Thirdly, in some schools a model where the head assumes the administrative responsibility and delegates the curriculum responsibility to deputies may emerge.

The link between the nature of the market and the school's

response emerges as important within this. Flightpath, for example, in its competitive, local micro-market has established a marketing group and appointed a teacher with a senior allowance (grade "D") as School Promotion Manager, stimulated by a rapidly declining rolls in 1989 and 1990. Similarly, in the field of marketing strategy, innovation seems to characterise those schools that experience the greatest competition. Flightpath has developed a number of clearly focused strategies to enhance its image and reputation and to increase its recruitment. These include providing teaching and project work with Year 5 pupils in their primary schools, inviting them for a properly timetabled day in the secondary school, and visits to targeted primary schools by senior staff . The schools selected for this targeting are those close to the catchment of the nearest school in the adjacent LEA, rather than those close to the nearest school in the same LEA. This appears to reflect a particular interpretation of the morality of marketing in different contexts.

The rapid pace of reform during the period since 1988 has created substantial cultural tensions within schools, at the level of both institutions and individuals, and also in the sphere of both professional and personal values. Teachers and senior managers in schools have, mostly, a substantial personal history in education and have a personal and professional philosophy that has evolved over time. Radical reform challenges those philosophies - as Bowe, Ball and Gold (1992) indicate...

"Reform does not eliminate historical cultures, it confronts them"  
(p37)

This idea reinforces the views of Deal and Kennedy (1982):-

"Change always threatens a culture. People form strong attachments to heroes, legends, the rituals of daily life, the hoopla of extravaganza and ceremonies - all the symbols and settings of the workplace. Change strips down these relationships and leaves employees confused, insecure and often angry"

(pp 157-158, quoted in Bowe, Ball and Gold (1992): 174)

Three key tensions emerge from this analysis. Firstly, the new environment within which schools are operating has created tensions with existing notions of collegiality and professionalism, and established a gap between the managers in schools and the rest of the staff. As Bowe, Ball and Gold (1992) indicate.....

“(There has been) a rise in the power of managers via their control of the budget, and a consequent erosion of the influence of classroom teachers in the decision-making process” (p147)

and

“The gap between new managers and teachers.....is not simply a division produced by role specialisation. It also represents a division of values and purposes” (p 159)

However, while this gap has developed it is not clear that it is a gap that either managers or teachers wish to close. In the case study schools there was a clear view from senior management that it was increasingly difficult to consult because of pressures of time and expertise, and in some cases because of a desire to protect teaching colleagues from becoming embroiled in the management demands of LMS. At the same time, Chapman (1990) has indicated that teaching staff have little desire to be involved in the complexity of the management process, so it is perhaps a superficially maligned but actually unmourned development in schools.

Secondly, there is a tension between meeting the needs of the customer and following professional judgments about what is an appropriate educational approach. In some cases schools appear to allow the customer pressure to influence what they choose to do, while at other times they resist the pressures in the interests of quality. The first of these is exemplified clearly from the case studies, where at Flightpath School pressure from parents was seen as sufficient to question a policy in the English department of mixed ability teaching in the lower school and to stimulate the establishment of a programme of monitoring the progress of a group of the higher ability pupils in the new intake. The marketing concern

was expressed by the deputy head in the following way...

“...well, lets take this academic thing seriously because the parents we’re losing are the aspiring middle class stereotypes, the caring parents, those are the people who are asking questions like, how many people go to university, what are you results like as first questions, and those parents aren’t that convinced of Flightpath”  
(quoted in Bowe, Ball and Gold (1992): 53))

It is clear that the school is keen to raise or at least maintain its “cultural capital” as part of its strategy of attracting in more pupils.

The second tension is illustrated by the decision of most of the schools in the case studies to recognise some sort of “optimum intake” which may be a little below the maximum intake according to their standard number. This reflects a concern to maintain class sizes at suitable levels and to avoid problems of overcrowding of classroom space by increasing the numbers of forms of entry. This tension relates to the sub-optimal financial returns on such decisions but may be a long term strategy in ensuring that the quality of educational provision is maintained to support over-subscription in the future. As Edwards and Whitty (1992): 103 indicate....

“Successful schools may...choose not to grow, seeing the costs to their manageability or ethos as outweighing any extra resources which expansion might bring”  
(Edwards and Whitty (1992): 103)

A further dimension of this tension is the impact of education on external professional relationships. The need for schools to be distinctive in the market place, and to compete with their neighbours makes collaboration more difficult. All the schools in the study commented on the decline in cooperation in curriculum areas, and in some cases on reneging on agreements about exchanges of ideas and teaching resources or the implementation of new ideas and approaches. Many of these tensions are



also apparent in the case of Northwark Park School, below.

Within the same broad study of the responses of schools to the market by Ball, Bowe et al, a single case study of one school has provided some useful insights into some of the cultural and moral tensions generated by such change (Gewirtz, Ball and Bowe (1993)). The study focuses on Northwark Park School in Northwark LEA (adjacent to Westway and Riverway) which is....

" ...an undersubscribed predominantly working class school whose staff and governors find themselves having to confront the issue of institutional survival in the market context"

(Gewirtz et al (1993): 233)

This study of cultural challenge identifies the "significant mismatch between the established culture of the school and the culture of the market" (Gewirtz et al (1993): 237), and considers the tensions generated by an adherence to 'comprehensive values' (the school is an 11-18 mixed comprehensive school with a roll of 700) and the need to compete with other schools in and beyond the LEA. This has meant that...

"The staff are reluctantly implicated in the market. They do not like it but they are part of it and most recognise a need to respond to it"

(Gewirtz et al (1993): 239)

The study builds on a statement of the conflict of comprehensive values versus market values which presents a polarised and idealistically stereotypical view of the two sets of values - comprehensive values for example are seen to engender, inter alia, a focus on student needs, universalism and mixed ability teaching, while market values are seen to emphasise student performance, differentiation and setting. Despite this, however, the study identifies the six areas of tension - the selection of target groups from which to expand the intake ; a review of mixed ability teaching; the integration of special needs children; the exclusion of children for disciplinary reasons; the benefits of belonging to a local system

of comprehensive schools; and the issue of 'opting out'. The first four represent areas of policy where the objectives of a truly comprehensive school are in conflict with the need to be successful in the market place. Attracting parents with 'cultural capital' has long term recruitment benefits to the school, for example, and an emphasis on 'setting' rather than mixed ability teaching and the exclusion of disruptive children is seen to make the school more attractive to such parents. Gewirtz et al explain that...

“....on the whole, as far as the teaching staff are concerned, the debate is essentially about the educational advantages or disadvantages of exclusion. At management level, however, it would seem that.....educational questions are being increasingly subordinated to commercial market orientations. The debate within management.....is centred on the question of whether it is a good or bad marketing strategy and about the financial implications of excluding”

(Gewirtz et al (1993): 247)

The last two issues focus more on collegiality. There is resistance to competition with colleagues in other schools and concern at the loss of a professional support network.

Overall, the study demonstrates the management pressures on the school from marketisation “to consider cultivating a more middle class intake and abandoning some of the key components of comprehensivism” (Gewirtz et al (1993): 251) despite the school's commitment to comprehensive education. Gewirtz et al suggest this demonstrates that the education market is neither neutral nor apolitical. It is leading to more selection and greater segregation between schools on the basis of social class, and this almost inevitably generates substantial ethical tensions within the school.

The Westway, Riverway and Northwark Park studies provide a very useful insight into the management responses to marketisation in two small LEAs and a single school. In particular they give a view of diversity of

practice, of the importance of micro-markets, of the role of relatively active consumers with 'cultural capital', and of the management tensions such marketisation can generate. They provide, in particular, a useful in-depth insight into marketisation, rather than the piecemeal scenes from earlier studies, and do so in the context of current socio-political environmental conditions.

#### **4.5 Summary**

This chapter has reviewed the research evidence from empirical studies relating to the management responses to the marketisation of schools. It has considered the anecdotal evidence from the literature of the early 1990s, and found it wanting in terms of objective insights. More reliable evidence exists in the snapshot pictures provided by pre-1988 general surveys of the work of headteachers, despite the different political frame of reference within which they were operating. This provides insight into their views of the nature and importance of marketing, of their interest in it and of their expertise in the field. The most significant contribution, however, is the longitudinal study of Riverway and Westway LEAs by Bowe, Ball et al which provide a picture of management response to marketisation in two highly competitive LEAs with substantial parent power. These insights provide the preliminary evidence base which is the background to the study in the remaining chapters of this thesis.



**CHAPTER  
5**

**Research Methodology**

## **Chapter 5**

### **Research Methodology**

#### **5.1 Introduction**

The limited extent of research in educational marketing means that no distinctive methodology within this specific area has been developed. However, in the broader fields of educational management there is a substantial literature on research methodology. Bell et al (Eds) (1984), Bell (1987), Hammersley (Ed) (1993), Cohen and Manion (1994), and Johnson (1994), for example, describe a wide range of research approaches from both qualitative and quantitative traditions. Although the genesis of the present study is within education, its focus overlaps into a range of social science areas, including management. Consideration has been given, therefore, to the research methodologies in those fields (eg Berg (1989)), although it is clear that the research traditions across the social sciences, including education, have very strong commonalities.

In selecting an appropriate methodology for research in this field, it was considered important to be aware of the complexity of change that was to be studied. The character of any organisation is the sum of its structure, culture and the activities that occur within it (O'Neill (1994)), and any study must enable each of these elements to be considered. Furthermore, Bowe et al (1992) contend that there are the issues of multiple change and of the historical context of each individual school that must be considered. Single change focus is inappropriate in most studies, since "change is rarely uni-dimensional" (p146) and the impact of multiple innovations and change will inevitably be both synergetic and interactive. Tensions generated in one sphere both impact upon and result from changes in each of the others. They suggest, therefore, that it is essential to take a broad focus in any single study. In addition they contend that most studies neglect the importance of institutional history in their analysis. Change is rarely a picture painted on a clean canvas and is therefore never being instituted in a politically-neutral environment.

As a study of the responses of schools to the development of a marketing culture in secondary education, this research attempts to recognise these considerations in its approach. At the same time it seeks to balance the complexity of study these issues suggest against the pragmatic view of time resource for the researcher and the ethical issue of impact within the schools under study.

## **5.2 Outline of the Research Method**

Figure 5.1 illustrates in the form of a path analysis the methodology deployed within this research. Such charts provide a simple outline of the broad methodology used, and are well-established within educational research (eg Davidson (1970); Hoinville and Jowell (1978)). The following sections examine the detail of this methodology. Section 5.3 examines a number of broad methodological issues. Section 5.4 discusses Phase 1 of the study which generated the Key Questions which are discussed in Section 5.5. Sections 5.6 (selection of case study schools), 5.7 (Alcheston case study), 5.8 (comparative studies and 'expert survey') and 5.9 (data analysis) describe the methodology employed in detail. Section 5.10 summarises the methodology and draws some general conclusions.

## **5.3 Methodological Issues**

This section focuses on the methodological issues that provide the framework within which the research programme was planned. It raises important considerations both in terms of the philosophical dimension of research in education, and practical issues in relation to the use of specific approaches. More specifically, it addresses the issues of quantitative versus qualitative methodologies; the nature and purpose of case study; the characteristics of survey methods; issues of access and the ethical dimension of the research; and the critical questions of validity and reliability.

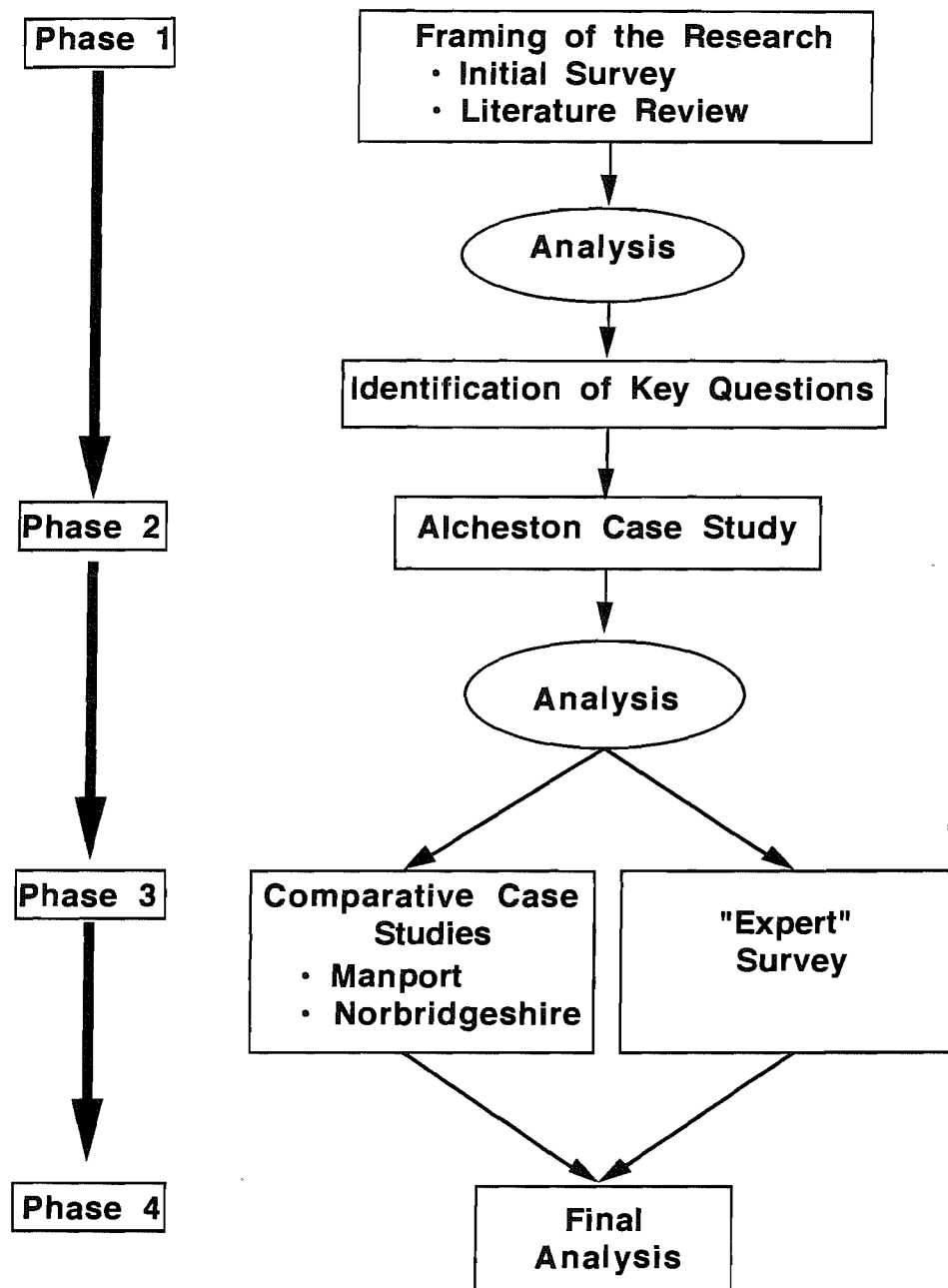


Figure 5.1 The research method - key pathways

### 5.3.1 The Methodological Framework

The research method employed draws from two key traditions within educational research methodology, a quantitative survey approach and a qualitative approach focusing on the use of case studies. While it is possible to categorise educational research methodology into a number of styles or traditions (eg Wilson (1984); de Landsheere (1993)), it is rare for individual research studies to be exclusively based in any single category. Indeed, too strict a methodological philosophy may constrain analysis. The complex environment of education management needs to be considered from a wide range of perspectives to enable real understanding to be gained. Schofield (1993), for example, is critical of the, at times, acrimonious debate between the qualitative and quantitative traditions that can be traced back to the retreat from a highly positivist approach to educational research driven by the writings of, inter alia, Cronbach (1974) and Campbell (1974). The growth of “multisite case studies” and the use of quantitative analysis where possible within case studies is used by Schofield to suggest that there is.....

“...a growing rapprochement between quantitative and qualitative traditions”

(Schofield (1993): 95)

In outline, the methodology chosen represents an attempt to develop some generalizable conclusions by combining a broad based survey of the practice of management in relation to marketing at a macro scale with a detailed insight into practice within a small number of case study schools - an analysis at the micro-scale. Such a combined approach is an established strategy for educational research used in a number of studies (eg Bush et al (1993)), where “the two approaches complement each other” (Nisbet and Watt (1984) : 23). Nisbet and Watt (1984: 23) indicate that “case study may precede a survey to identify key issues”. Here, the case study and survey have been applied in a more complex cross-referencing system - a simple survey informed the identification of key questions and the framing of the main case study, which in turn was



used to strategise a further, broader survey and a second phase of case study. This might be described as an integrated case study - survey approach.

In each part of the study both qualitative and quantitative methods are used. However, the research is essentially a qualitative study in which the use of quantitative methods is for descriptive purposes. Numerical data is used simply to provide dimension to the elements being described or discussed, and is not used inferentially.

### **5.3.2 The Case Study Approach**

The case study approach to educational research involves "the systematic investigation of a specific instance" (Nisbet and Watt (1984): 74). Johnson (1994) describes its characteristics in the following way:-

"A case study is an enquiry which uses multiple sources of evidence. It investigates a contemporary phenomenon within its real-life context, when the boundaries between the phenomenon and the context are not clearly evident"

(Johnson (1994): 20)

It is an approach rather than a single technique, and involves the gathering of evidence by a variety of methods, including observation, interview and the examination of documentary evidence. It is an approach that has become widely recognised as a research methodology in its own right within the last two decades (Simons (1979); Bell et al (1984), including the work of Richardson (1973), Shipman (1974) and Hamilton (1975); Kogan (1984); (Bush et al (1993)).

As a methodology it has a number of identifiable strengths and weaknesses (Nisbet and Watt (1984); Adelman et al (1984); Johnson (1994); Cohen and Manion (1994)). A distinctive strength of the approach is its focus on real situations, and its "embeddedness in social truth" (Adelman et al (1980): 23). A key component of this is its ability to cope

with the complexity of real situations, which “allows attention to the subtleties and complexities of a case” (Adelman et al (1980): 23). Johnson (1994) extends this view to emphasise the value of case study in terms of its ability to present intelligible non-technical findings, as compared to highly quantitative methodologies. She contends that this also means that although full generalisability cannot be claimed for case studies, they have the property of ‘relatability’ (Bassegy (1981)).

The weaknesses of the approach lie partly in the inherent characteristics of case study, and partly in the specific dangers that may be found in its use. Firstly, the approach lacks the mathematical rigour of experimental or quantitative techniques, although Nisbet and Watt (1984) contend that a key feature of the approach is that it gathers evidence systematically “in a scientific way” (Nisbet and Watt (1984): 73). Secondly, the possible uniqueness of the material collected is raised by Johnson (1994) as a weakness, and she emphasises that “non-uniqueness is the aim” (Johnson (1994): 23) in a case study approach.

The third concern relates to the uneven access that is available to the researcher within the case study. Not all components of the case can be allotted equal or appropriate time, and an understanding of what would be appropriate time may not emerge until the case study is beginning to generate issues and ideas. Distortion of the insight from case study may therefore be inherent in the design stage.

A final concern about the case study approach relates to the need to pursue the research in “a scientific way” (Nisbet and Watt (op. cit.): 73). Johnson (1994): 23) emphasises that case study is “not merely to portray a specific situation, but to do so in a way that illuminates some more general principle”, and that it must involve a process of conceptual analysis. This might involve either the generation of “grounded theory” (Glaser and Strauss (1967)), or the analysis of the case in relation to existing theories or knowledge. The dangers of a lack of conceptualisation and recourse to mere description is emphasised by Nisbet and Watt (1984).

Each of these issues is considered in relation to the design of specific elements of the present study in the methodological description and data analysis within Chapters 5 to 8.

### **5.3.3 The Survey Approach**

“Among educational research endeavours, surveys are the oldest” (de Landsheere (1993): 9), with a primary purpose of “eliciting equivalent information from an identified population” (Johnson (1994): 13). They have the key strengths of providing a breadth of coverage and of generating data that, providing the survey parameters have been established in a valid way, is both generalisable and comparable to other circumstances. Their value has been summarised by Moser and Kalton:-

“ Surveys are one way, and a supremely useful one, of exploring the field, of collecting data around as well as directly on the subject of study, so that the problem is brought into focus and the points worth pursuing are suggested”

(Moser and Kalton (1985): 4)

However, despite this value, the use of surveys must be undertaken with an awareness of the limitations to the depth of analysis and coverage that they provide, and the substantial potential for bias to be built in intentionally or unintentionally in the design of survey instruments. In particular, three aspects of surveys need careful planning - the selection of the sample, the design of the data collection instrument (often a questionnaire), and the maximisation of response rate.

Within this study, surveys were undertaken in two distinctive situations - the survey of pupil and parent views in the case study schools in Phases 2 and 3, and the expert survey in Phase 3. The sampling method differed in each situation. In the expert survey the sample was a purposive sample, in which the researcher “handpicks the cases to be included in the sample on the basis of .....(a) judgment of their typicality” (Cohen and

Manion (1994) : 89). With no intention to use the numerical data for other than descriptive and dimensional purposes, a sample size of 25 was deemed to be adequate in this case. In the survey of pupils and parents, the sample represented a random sample of "pupils plus their parents", in that the tutorial groups chosen for survey in each school were random selections of pupils within their year group. Sample size (typically 25-28 in each school) meant that statistical validity would not be acceptable in the analysis of data within a single school, but that the total sample across all the schools would provide a large enough sample for suitable statistical analysis.

The data collection instrument in each of the surveys was a semi-structured questionnaire. The nature of these questionnaires is discussed in Sections 5.7.6 and 5.8.4 below. Tuckman (1972), Selltiz et al (1976), Bell et al (1984) and Cohen and Manion (1994) provide checklists for the analysis of questionnaires, to enable the avoidance of issues such as the use of leading questions, questions with negatives, or ambiguously phrased or complex questions. The application of these checks, and the trialling of each questionnaire was an important element of the process of designing each research instrument.

Maximisation of the response rate is the third area of focus in survey design. Moser and Kalton (1971) have highlighted the issue in indicating that.....

"Non-response is a problem because of the likelihood.....that people who do not return questionnaires differ from those who do"  
(Moser and Kalton (1971): 268)

Belson (1986) regards this as a serious validity issue in the use of "distance completion" questionnaires, and the avoidance of 'volunteer bias' (Belson (1986)) is an important consideration in planning the survey process. Cohen and Manion (1994) address a range of mechanisms for optimising survey returns, and suggest that a survey should produce...

“...a 40 per cent response rate and, with the judicious use of reminders, a 70 per cent to 80 per cent response level should be possible”

(Cohen and Manion (1994): 98)

The range of strategies use to enhance response rates is outlined in the later sections that address each survey specifically.

#### **5.3.4 Interviews**

Within the broad field of case study research the interview is a commonly used research method (Wragg (1984), Bell (1987), Cohen and Manion (1994), Johnson (1994)). Kerlinger (1969) has identified three main uses of interviews, in that they may be used...

“...to follow up unexpected results, to validate other methods, or to go deeper into the motivations of the respondents”

(Kerlinger (1969) : 81)

In using interviews, two key issues emerge for consideration - the challenges of designing the interview schedule and circumstances to facilitate responses from the interviewee, and the minimisation of concerns relating to the reliability and validity of the method.

In terms of interview design, Tuckman (1972), Wragg (1984) and Bell (1987) provide useful checklists on issues such as the choice of interview method (structured, semi-structured or unstructured approaches), question design (for example, the use of specific or non-specific questions, and factual or opinion based answers), and the timing, location and etiquette of interviewing. These issues are discussed in relation to the interview procedures outlined in each stage of the research programme later.

Cicourel (1964) has identified four key concerns relating to the reliability of interview data (see Section 5.3.6). Firstly, the precise

circumstances of a single interview can never be repeated, since they depend on the natural dynamics of the relationship between interviewer and respondent, and also on environmental factors, both human and physical. Secondly, there is usually some degree of interviewee unease, which may lead to the use of avoidance tactics in answering questions. Thirdly, no respondent ever tells everything they know, either for innocent reasons of recall or covert political reasons. Fourthly, even with good intentions on the behalf of interviewer and respondent, meanings may not be mutually understood, either from the questions or from the answers. These concerns have lead some researchers (eg Cannel and Kahn (1968)) to question the fundamental reliability (see Section 5.3.6) of interviews. Kitwood (1977) contends that by paying careful attention to the issues of interview schedule design, reliability can be improved - although this may be at the cost of decreasing validity (see Section 5.3.6), for greater constraints on the interview may limit the depth, detail and subtlety of the responses that can be elicited.

Validity (see Section 5.3.6) is a further important issue in the use of interviews, and relates particularly to the interpretation and analysis of the data collected. Wragg (1984) emphasises the importance of subjecting interview notes and tape transcriptions to content analysis that is double checked, with a second reader "independently making his (sic) list of salient points" (Wragg (1984): 191). This issue is addressed in the context of this study in the appropriate later sections dealing with analysis.

### **5.3.5 Access and the Ethical Dimension of the Research**

Any form of educational research that engages directly with individuals and organisations raises important issues about the ethics of the research process (Burgess (1988)). Of necessity addressing such issues is often a pre-condition of the negotiation of access for the study to be undertaken, and access can never be guaranteed either to initiate the research or to continue it once started. The 'gatekeepers' (Johnson (1994)) must always be identified and a process of negotiation must be undertaken. Johnson (1994) suggests that there are three stages to the

negotiation of access - identifying the gatekeepers, identifying and responding to the ethical issues, and, finally, negotiating the precise access conditions.

For the case study elements of this research programme, the identification of the gatekeepers was straightforward, in that the headteacher of each school would decide whether access should be granted and under what conditions. However, in each case of successful access, the headteacher consulted the Chair of Governors and colleagues who would, of necessity, be involved in the research before agreeing to access.

The ethical issues were identified with reference to the suggestions of Hopkins (1985), Simons (1988), and Sammons (1989). In the initial informal approaches to schools (see Section 5.7.1), the ethical issues were raised by the researcher, and headteachers were invited both to discuss these issues, and to raise issues of their own. The particular issues raised were:-

- the avoidance of undue intrusion into the day-to-day operation of the school
- the maintenance of confidentiality, so that information obtained in one school was not made available to others, and the responses of individuals were not divulged.
- the maintenance of anonymity for the schools and individuals in the final published output from the research
- the importance of 'informed consent' (Diener and Crandall (1978)), to ensure that no colleague, pupil or parent would be asked to participate in the research without clear understanding of their role and the use that would be made of their data.

Amongst these issues, those of intrusion and anonymity were the most problematical for schools, and were the reasons cited by one of the selected case study schools (Eastville) for non-participation. In particular, headteachers were clear that the nature of the research issue (marketing)

was so sensitive that very tight limitations on the operation of the study would be required. All insisted that the tape-recording of interviews would not be permitted, and that absolute anonymity would be necessary in the published material. The researchers response to these problems are explained in later sections, but two specific points must be made here. The first is that the study is reported throughout with pseudonyms for all schools and their localities. Secondly, the use of pseudonyms prevented the consideration of the formal symbols of institutional identity within this study, such as school names, logos and crests.

### **5.3.6 Validity and Reliability**

Two important aspects of educational research are the concepts of validity and reliability. Reliability refers to “the extent to which a test or procedure produces similar results under constant conditions” (Bell (1987): 50-51), and may be seen in terms of whether another researcher using the same methods would produce similar results. Validity refers to whether the research methods used actually measure or record what they are believed by the researcher to be measuring.

Reliability is a problematical concept within qualitative research, in that the very uniqueness which defines the ethnographic study or the case study means that the research would be unlikely to be repeated in precisely the same way by another researcher. Schofield ((1993): 93) indicates that the researcher “just needs to be sure that other researchers conclusions are not inconsistent with the .....account, for it is impossible to make precise replication a criterion for generalizability in qualitative work” . Bell ((1987): 51) suggests that “ in most cases the check for reliability will come at the stage of question wording and piloting of the instrument”. This is the strategy used by this researcher for all the formal research instruments used. More difficult, however, is the issue of reliability in analysing open responses to questionnaire questions, and interview notes. The latter issue is considered later in Section 5.7.2.

Validity has a number of dimensions. In terms of the applicability of



a measure of validity, Campbell (1969) has distinguished between 'internal' and 'external' validity, while Sapsford and Evans (1984) have distinguished three types of validity in terms of their nature - 'face validity', 'predictive validity' and 'concurrent validity'. In case study the key priority is for internal validity, to be sure that a specific observed cause produced a specific observed effect. However, the qualitative nature of the data and the importance of the researchers role as direct observer makes validity difficult to test.

In the present study three main approaches to validation were adopted. Firstly, the use of a third party to examine the data collected and to review the conclusions derived from that evidence was the method deployed in relation to the interpretation of the qualitative interview and survey data. This provided a suitable indication of face validity through....

“...an assessment of the soundness of the logical argument , the exclusion of biases and the assurance that the data collected are actually measures of what they purport to measure”

(Sapsford and Evans (1984): 259-260)

The specific method employed is described in Section 5.7.2.

Secondly, triangulation was employed in an attempt to ensure validity within the interview processes in the case study schools. Adelman et al (1984) have emphasised the value within case study of collecting accounts from a range of participants to consider events or ideas from diverse perspectives. In the present study the ideas and views of headteachers, 'marketing managers' and chairs of governors were derived from an interview schedule which was substantially common to all three groups, and hence cross-checking of responses could occur. This was developed further through the staff sample interviews where the perceptions of staff were cross-referenced with those of senior staff.

Thirdly, the use of respondent validation (McCormick and James (1983)) was adopted. This approach to validation is regarded as

particularly appropriate in qualitative studies where, because of the....

“..apparently subjective nature of much qualitative interpretation, validation is achieved when others, particularly the subjects of the research, recognise its authenticity”

(McCormick and James (1983): 32)

Within the case study element of the present study this approach was used in two ways. Within each interview interpretations were reported to the interviewees for confirmation, clarification or modification. In addition, an important element of the final interviews with headteachers in the Alcheston schools was to present the key findings of the earlier interviews and to invite responses to the researcher’s analysis.

#### **5.4 Phase 1 - Framing of the Research**

A wide ranging literature review and a subjective judgment of the key issues in the field, emanating from the development of an MA course unit on “Educational Marketing and the Management of External Relations”, identified very limited research-based insight into marketing in schools. In the light of this review, Phase 1 of the study extended the literature review and also involved three further tasks to formulate key questions.

Firstly, a small number of headteachers and deputy headteachers of secondary schools was interviewed to identify issues in the management of marketing. Five deputies were selected for interview from amongst those taking the MA (Ed) “Marketing” unit. Five headteachers were interviewed in school and a further seven were telephoned to be interviewed. These represented a broad range of urban and rural schools. The interviews used three open questions:-

- a) How do you feel personally about the marketing of schools ?
- b) How has your school / college responded to the idea of the marketing of schools ?

c) What are your main concerns about current practice in the marketing of schools ?

The second task was a review of the assignment work of 48 students taking the "Educational Marketing" course. The assignment was to undertake a simple external relations audit of their own educational establishment (Appendix 1). Of the 48 assignments some 26 related to practice in secondary schools.

The third task was undertaken once the case study schools had been identified (see Section 5.6), and involved preliminary interviews with the headteachers. This was a repeat of the interviews outlined above, and was, firstly, to establish a further basis for structuring the key questions in the study, and, secondly, to ensure that the issues that were likely to emerge from the case study were broadly the same as those identified elsewhere.

## 5.5 The Key Research Questions

The research objectives within this project are defined by a number of key questions. These have emerged in part from the analysis in earlier chapters, but have been refined and given precision by the work undertaken in Phase 1 of this study, described above. The three key questions interrogate the perception of marketing in schools, their organisational responses, and the impact of marketisation on their culture. Each of these key questions is, itself, shaped by a number of sub-questions which target quite specific themes. These are explained below. To facilitate cross-referencing in both the description of the research method and in the analysis and discussion of the research findings, the key questions (**KQ**) and sub-questions (**SQ**) are coded.

### **5.5.1 Key Question 1**

**(KQ1) How is the concept of marketing received and understood in schools ?**

The analysis in Chapters 1 and 2 demonstrates that there exists a wide range of perceptions of the nature of marketing, both in general terms and also in the context of education. It is asserted here that the interpretation of the concept by managers in schools at all levels is extremely varied, and that this interpretation dictates the manner and style of response. This question seeks to describe, explain and analyse those differences of interpretation to provide an understanding of the philosophical background in schools against which marketing practice has developed. Two sub-questions may be identified as leading to a full understanding of this field, i.e.

- **(SQ 1.1) How do different stakeholders in schools perceive the concept of marketing ?**
- **(SQ 1.2) Are there common themes in the understanding of the idea that might enable a model of the conceptualisation of marketing in schools to be identified ?**

### **5.5.2 Key Question 2**

**(KQ 2) What have decision-makers in schools, whether they be headteachers, governors or classroom teachers, done to modify the organisation of the school's management in response to pressures towards marketisation ?**

This question seeks to identify the managerial responses of secondary schools to the pressures for the growth of marketing. It is considered here that changes will be identifiable at different levels in organisations, in part depending upon the view of marketing that individuals or the organisation have. Modifications to strategic planning

and the development of specific operational activities will be described and analysed both in terms of their own inherent changes and in relation to the perceptions described in KQ1. The sub-questions to KQ2 are as follows:-

- **(SQ 2.1) What organisational structures have developed to 'manage' external relations and marketing ?**
- **(SQ 2.2) What strategic planning (both rational and non-rational) is being employed in these areas ?** This sub-question considers whether a consideration of the market has significantly altered the planning perspective and process in schools.
- **(SQ 2.3) What strategies, tactics and methods are being employed in the the field of marketing ?** This sub-question considers the nature of the marketing methods and tactics used by schools.
- **(SQ 2.4) Do those working in schools have an adequate understanding of their needs in this area ?** This considers whether there is sufficient expertise in schools to engage with a marketing culture at the practical level and whether there are specific training needs that can be identified.
- **(SQ 2.5) What evaluation methods, if any, are being deployed by schools ?**

### **5.5.3 Key Question 3**

**(KQ3) How far has a marketing culture developed within secondary schools as a result of the marketisation of education ?**

This question seeks to examine whether there have been any identifiable changes in the culture of schools as a result of marketisation. It is asserted here that the injection of concepts related to market theory, client-centred organisations and parental choice should lead to substantial

changes in the culture of schools if they are deemed to have been successfully assimilated. They are, quite simply, a means of re-orienting the professional culture of education towards a philosophy of institutional relationships in keeping with the government's ideology. This should be identifiable in the internal relationships within schools and the priorities accorded to different activities. It will be seen, too, in the attitudes of the principal clients of the market relationship, including parents.

## **5.6 Phase 2 -Selecting the Case Study Schools**

### **5.6.1 Introduction**

Case study was identified as the principal methodology to provide an insight to "a contemporary phenomenon within its real life context" (Johnson (1994): 20) with "attention to the subtleties and complexities of (the) case" (Cohen and Manion (1994): 123).

The choice of schools for the key case study within the research was constrained by a number of pragmatic considerations in addition to those considerations which related to the methodology and to the purpose of the research. It is clear that the competitive or collaborative relationships of schools are both complex and simple. They are simple in that between any pair of schools there exists a specific marketing relationship. This relationship can be examined from the perspective of each of the schools concerned, and its character and processes may be determined. However, relationships are also complex, in that each school will have such a one-to-one relationship with a number of other schools. Each of these relationships will differ in its nature. Some will be much more competitive than others, and some may be highly collaborative. Some schools, even in the same locality, will compete with other local authority schools, while others may find that the independent sector provides a major focus for competition, or collaboration. At the macro level the nature of the market place, even within a small locality, therefore, may be extremely complex.

Following this consideration, in the design of the research

programme it seemed important to choose as a case study the operation of a market with specific characteristics i.e.....

- A market with a small number of key schools as the competitors within the market place. This needed to be more than two schools to enable the complexity of marketing relationships to be examined. However, too large a number would have made the analysis difficult, and it was deemed appropriate to choose a market with three to five schools operating within it.

- To simplify the analysis it was considered important to identify a market which operates as far as possible as a closed system. In this way the relationships of individual schools with other schools beyond the case study system may be considered as relatively unimportant. The key concerns of the schools will be with their competitors within the locality of the study and not beyond it. In reality such a closed system must be regarded as an unrealistic concept. In most regions the density of population and the proximity of neighbouring towns means that all schools might be considered to operate both in the market place of their own locality and in that of adjacent areas. However, it seemed appropriate to select a case study market that approximated to a closed system.

The market location chosen for the initial case study represented a good approximation to these parameters, and consisted of the secondary schools in and around a town of 40,000 population in central southern England. Within this thesis the town will be referred to as Alcheston. Alcheston is an employment, administrative and ecclesiastical centre for a large rural hinterland, and lies some 20 kilometres from settlements of similar size and importance to the north and south of it. Its population is relatively affluent, with a high proportion of its workforce engaged in service and professional employment either in the town itself, or by commuting either to London or to the cities of the south coast. The population of the Alcheston local authority area rose by 6.4% in the period 1981-91 (Geographical Digest (1994)). This has provided an expansionary pressure on the schools in the study, despite a decline in pupil numbers in

the LEA (for the county LEA) of 1.5% in the period 1991-94 (DfE (1994)).

The local authority education system within Alchестon is organised in a manner similar to that in many authorities which reorganised in response to falling rolls in the 1970s and 1980s. Primary schools serve the 5-11 year old children, with transfer to 11-16 mixed comprehensive school at age 11. Beyond 16, education is provided by an open access sixth form college in Alchестon, or by further education colleges in the cities some 20 kilometres distant. The case study focuses on the 11-16 comprehensive schools in or close to Alchестon. Three of these are within the city itself - Castle School, Downsview School and Eastville School - while a fourth school, Lee School, must be regarded as part of the same market place and serves the nearby town of Winsford some 12 kilometres from Alchестon. The nature of each of the case study schools is considered below.

## **5.6.2 The Alchестon Case Study Schools**

### **a) Castle School**

Castle School is of relatively recent establishment having been formed in 1985 as a result of the amalgamation of a pre-existing boys comprehensive school and a girls comprehensive school that stood on adjacent sites on the south-western edge of the town. The school has approximately 1050 pupils on roll with 7 form entry, and occupies a large campus in an elevated position with views of the surrounding rural area. Its natural catchment is the south and south west of Alchестon, urban ribbon developments along main communication routes to the south, and the rural area to the south west of the town. A new building programme has been undertaken by the LEA costing some £3 million which has enabled the school to occupy only one of the original two schools, and much of the school now consists of modern, purpose built accommodation with teaching facilities of a very high quality, set in attractively landscaped grounds. The school also includes the LEAs boys boarding house, which accommodates some 30 boys who attend the school. The headteacher has



been in post since 1985, and two of the three deputies have been appointed since 1992, one by internal promotion.

The headteacher describes the school as “superficially more formal” than other schools in Alcheston, with a strong emphasis on “uniform and good order”. He stresses that the school has a higher proportion of able pupils than others in the town, and these are a prioritised and targeted focus of curriculum development.

### **b) Downsview School**

Downsview School opened in 1972 as a purpose built mixed comprehensive school on the North-western edge of Alcheston. Its accommodation dates largely from its opening, with the addition of temporary huts. The school occupies a sloping site, with views out into the adjacent rural area. Its roll is approximately 1020, and the school draws from a nominal catchment which includes the north and west of Alcheston and a very large rural hinterland with a substantial number of commuter villages. The headteacher was appointed in 1990 to replace the school’s first head on retirement.

The school is perceived by the headteacher as “more relaxed than Castle School” and emphasises the school as “a community of 1000 individuals”. The school has a dress code, and while “we are not too harsh on dress and hair we are not slapdash”. The atmosphere is described by the headteacher as “purposeful - pupils are happy, enjoy learning and reach high academic standards”.

### **c) Eastville School**

Eastville School was identified initially as a case study school, although the researcher’s approaches were rejected and the school was not actively involved in the study (see Section 5.7.1). As a major ‘player’ within the Alcheston market, however, it is necessary to provide here a description of the school in the interests of completeness and later

reference. Eastville originated as the girls grammar school for the town, but changed to its present identity when it became a mixed comprehensive school in 1973. At the same time the boys grammar school became the town's sixth form college. The school occupies a twenty acre site close to the centre of Alcheston. The buildings are somewhat mixed in style, and include the 1920's grammar school, and classroom and workshop areas constructed in the early 1970s at the time of comprehensivisation. The school has the LEAs girls boarding house, which accommodates some 5% of the school's roll. The headteacher has been in post for six years. The school is perceived by the other headteachers in Alcheston as strongly competitive with a growing emphasis on "traditional values". The school has, for example, recently introduced a new stricter uniform code.

#### **d) Lee School, Winsford**

Lee School serves the small town of Winsford for 11-16 educational provision, but has traditionally sent a substantial proportion of its pupils to the sixth form college in Alcheston for post-16 education. It is a community school which provides a wide range of educational provision to Winsford, and to the commuter villages in its large rural catchment. Its number on roll is about 650. The staff has limited 'turnover' although the school appointed a new headteacher in January 1994, to replace a head taking retirement after some 17 years at the school. Its buildings are mixed in character, some dating from the 1920s, others representing subsequent building phases. It has a large campus with extensive playing fields on the western edge of Winsford. The headteacher regards the school as emphasising care for the pupils in the context of a search for excellence, with a strong community involvement.

Figure 5.2 provides a statistical profile of the schools, which emphasises the similarities between them in terms of 'output' statistics. The market environment of Alcheston and Winsford is currently secure for all of the schools, and none is declining significantly in numbers. Competition is mainly within the catchment areas of the towns, where the different 'character' of the schools provides some differentiation in the market. The

School	Number On Roll		% Change 1991-94	GCSE Passes				Unauthorised Absences (% Half Days) (1994)	S.E.N. Statemented Children (1994)
	1991	1994		1992		1994			
				% A-C	%A-G	% A-C	%A-G		
Castle School	884	1019	+15.2	49	87	61	94	0.1	23
Downsview School	1025	1006	- 1.8	57	91	62	97	0.3	16
Eastville School	907	952	+ 4.9	58	91	57	97	n.a.	17
The Lee School	658	662	+ 0.6	61	93	57	95	n.a.	19
LEA Area Average			- 1.5	37	84	44	90	0.5	

Figure 5.2 Profile of the Alcheston Case Study Schools

major competition where the schools are losing is with the independent sector. The only substantial 'gains' are at Castle School where accessibility to commuter villages to the south draws in pupils from the catchments of schools beyond Alcheston.

## **5.7 Phase 2 - The Alcheston Case Study**

### **5.7.1 Access and Approval**

The initial approach was made informally, through personal contacts with senior staff in each of the schools. The informal approach was followed by a formal enquiry by letter to the headteacher of each school (Appendix 2) which outlined the aims of the research, the methodology and the published product of the research. Three of the four secondary schools in Alcheston responded positively, and after an informal meeting between the researcher and the headteacher in each school, agreed to participate on the following conditions:-

- No interviews should be taped
- Complete confidentiality of discussions within each school must be maintained.
- The identity of each school should not be revealed and must be referred to by a pseudonym in the research report

The headteacher of Eastville School, however, was unwilling to engage with the research in an active way, despite reassurance from the researcher on each of the issues outlined above. Information on the management of marketing in Eastville School was limited, therefore, throughout the research to outside observation through published documentation and the views of staff, parents or pupils from the other participating schools.

The responses of schools to the invitation to participate, and the operational constraints they imposed, are of interest in themselves and represent research findings of note. It is clear that the headteachers are



sensitive to the nature of competition and the potential consequences of operating in the market place. This makes the field of marketing a particularly difficult one in which to undertake research, and one in which the ethics of research play a particularly important role.

### **5.7.2 Interviews with Headteachers**

Interviews with the headteachers of each of the three co-operating schools were undertaken during the period January - March 1993. Each agreed to allocate two separate meetings to the interview process, to allow sufficient time to be given to the interviews. The initial approach to the schools requesting their involvement in the research had indicated that the headteacher interview was a significant element within the research programme, and heads had indicated their willingness to give sufficient time to this.

In each case, the head indicated as a condition of allowing the research to proceed that the interviews should not be tape-recorded because of the sensitive nature of information relating to marketing. An alternative strategy for recording the interview was therefore required, and the method chosen was the use of interviewer notes followed by the "transcription" of the notes on to summary sheets as soon as possible after the interview. The limitations of this technique relate principally to issues of accuracy in recording, both because of the speed at which the interviewee responds and also because of the need for the interviewer to interact with the interviewee at the same time as writing. In addition the question of interviewer bias in the selection of material for notes, in their transcription and in the summary process is of some significance. These issues were addressed in the manner described below.

The recording of the interviews was undertaken using notes under the structured headings of a questionnaire schedule. Information was recorded in as detailed a way as possible, using abbreviations, notations and symbols. In many cases it was possible to record sentences and phrases verbatim, and these were indicated by the use of inverted

commas. The accuracy and validity of the method was tested in three ways. Firstly, in preparation for the interviews the interviewer undertook three brief sample interviews with colleagues in which the note-recording form was used. At the end of each interview the notes were transcribed into summary form, and then their content was discussed with those interviewed to review the accuracy and fullness of the notes. This had the effect of giving the interviewer practice in the technique, but also enabled some refinement of the methodology of recording in notes. Secondly, during the interviews, at the end of each question from the schedule, the interviewer reported to the interviewee the key points that had been noted. This enabled the interviewee to correct any obvious misconceptions or misinterpretations, and also allowed some scope for refinement of the answers provided. It also enabled the interviewee to correct any omissions of recording. Thirdly, during the data analysis phase, a sample of the interview notes (two sets for each of the headteacher, 'marketing manager' and governor interviews) was subjected to analysis by a third party, to indicate whether the researcher's interpretations of responses and allocations to categories in the analysis appeared to be valid.

The interview schedule for the interviews of headteachers is shown in Appendix 3. Figure 5.3 is a construction analysis of the interview schedule, and demonstrates the focus of each question and its relationship to the key questions that form the research target of this thesis. Appendix 10 contains an example of the interview notes from one of the Alcheston schools (Appendix 10a) and the summary notes from all the headteacher interviews in Alcheston (Appendix 10b).

A second phase of headteacher interviews was undertaken in the Alcheston case study schools in Autumn 1994. This was intended to verify the interpretations from the earlier interviews, and also to identify subsequent changes. The same interview schedule was used as with the original interviews, and the summary notes are included here as Appendix 10c. In the case of The Lee School this interview was with the new headteacher who had been appointed in January 1994.

Question Number	Summary of Main Question	Question Type	Research Questions Addressed	Notes
1	What do you understand by the terms 'marketing', public relations, external relations and promotion ?	Structured Open	KQ1	
2	What is your <b>personal</b> view of the place of marketing in education ?	Open	KQ1 KQ3	
3	How far is that view modified or constrained by practical realities ?	Open	KQ1 KQ2,KQ3	
4	How important is marketing relative to other management functions of the school ?	Open	KQ2	
5	How has the school's policy and philosophy on marketing changed over the last 5 years ?	Open	KQ1 KQ2	Not asked of Govs or 'Marketing Managers'
6	Does the school have a marketing plan ?	Yes / No + Open	KQ2 SQ2.2	Interviewees asked to elaborate on answer Not asked to Gov/MMs
7	How far does marketing appear in the school development plan ?	Open	KQ2 SQ2.2	Not asked to Gov/MMs

(Continued.....)

**Figure 5.3 Construction analysis table for headteacher, 'marketing manager' and chair of governors' interview schedules (1)**

Question Number	Summary of Main Question	Question Type	Research Questions Addressed	Notes
(.....Continued)				
8	How is the marketing of the school organised in terms of planning, implementation and evaluation ?	Structured Open	KQ2 SQ2.2, 2.3 2.5	Not asked of Govs or 'Marketing Managers'
9	What is the role of each of the following in the school's marketing - head, deputy head, pastoral heads, academic heads, main teaching staff, support staff ?	Structured Open	KQ2 SQ2.1	"Marketing managers" and governors asked only about their <b>own</b> role
10	What experience is there of training for marketing ?	Structured Open	KQ2 SQ2.4	Governors asked only about <b>own</b> training
11	What are the current internal and external constraints in developing a marketing strategy ?	Structured Open	KQ2, KQ3 SQ2.2	Not asked of Govs.

(Continued.....)

**Figure 5.3 Construction analysis table for headteacher, 'marketing manager' and chair of governors' interview schedules (2)**



Question Number	Summary of Main Question	Question Type	Research Questions Addressed	Notes
(.....Continued)				
12	How is the budget for marketing calculated and allocated ?	Open	KQ2 SQ2.1,2.2	Not asked of Govs
13	Who holds the budget for marketing ?	Closed	KQ2 SQ2.1,2.2	Interviewees invited to elaborate on answer Not asked of Govs
14	What marketing research has been undertaken in / by the school ?	Open	KQ2 SQ2.2	Not asked of marketing managers or governors
15	What marketing methods are used ?	Open	KQ2 SQ2.3	Not asked of marketing managers or governors
16	How do you see marketing in schools developing over the next decade ?	Open	KQ2,KQ3	

**Figure 5.3 Construction analysis table for headteacher, 'marketing manager' and chair of governors' interview schedules (3)**

### **5.7.3 Interviews with ‘Marketing Managers’**

The second target group of staff for interview in the case study schools comprised the senior staff with specified responsibility for marketing and external relations, other than the headteacher. For ease of reference these individuals are referred to in this study as ‘marketing managers’, although in no case was this a title accorded by the school, and the precise nature of responsibilities varied from person to person. It is, however, a convenient term, since all had some responsibilities in the field of marketing, but their position and status in the school differed.

The interviews with the three marketing managers were conducted under the same conditions as those with the headteachers. An interview schedule was used to focus the questioning, and the interviewer recorded the interview by means of note-taking. It differed from that used with the headteachers in two key respects. Firstly, those questions which focused simply on the listing of activities and events were omitted from the deputy headteacher interviews. For example, Q14 and Q15 in the headteachers’ interviews enquired about the range of marketing research that the school had used, and the promotional methods employed by the school, and it was felt that this information would be duplicated in interviewing the deputy headteachers. Secondly, the focus of the questioning was on their own role, their attitudes to it and their own perceptions of marketing within the school. For example, Question 10 to the headteachers asked about training opportunities within the school for all staff. The question to the deputy headteachers enquired about their own experience of training. These differences are described in Figure 5.3.

Appendix 11 contains the summary notes from all the marketing manager interviews in Alceston.

### **5.7.4 Interviews with Governors**

The empowerment of the governing bodies of schools through the legislation of the 1986 Schools Act and the Education Reform Act 1988 has

brought governors into a more active role within the management of schools. Their responsibility for the prudent financial management of the school and for the development of policy for most aspects of its operation means that their perspective on marketing may be of some importance in understanding the development of a marketing culture.

In each of the case study schools the chairperson of the governing body was interviewed, in part to elucidate their own perspective on marketing, but also as part of the triangulation process within the research. The methodology of the interviews was similar in most respects to that of the headteacher and marketing manager interviews, incorporating the use of a structured interview schedule and recording of the interview using interviewer notes. The interview schedule for the governor interviews focused on the governor's perceptions and role, rather than on the factual recording of information about the marketing process. The difference between the interview schedule questions and those used in the headteacher interviews is illustrated in Figure 5.3.

An important constraint in the interviews with governors was that of time. Each had agreed to a brief interview but had taken time away from their normal employment to provide this. The duration of the interview was limited, therefore, to approximately 45 minutes, and it was not possible to arrange second interviews. The depth and range of discussion in relation to the interview questions was, therefore, constrained.

Appendix 12 contains the summary notes of all the governor interviews in Alcheston.

### **5.7.5 Staff Sample Interviews**

A key focus of the research question relates to the reactions and responses to marketing of staff across the institution, from senior management to new teachers or "main grade" teachers, and extending into

the support staff from site superintendents to secretarial staff to senior administrative officers. The method selected for investigating this aspect of the knowledge base was personal interviews, using a pre-determined interview schedule, administered to a "sample" of staff.

The selection of staff to be interviewed was problematic, because of the necessity to select an appropriate sample. Initial consideration was given to the use of a random sample of about 15% of the staff in each school, generated using a random numbers table applied to an alphabetical staff list. This was rejected as inappropriate since it was deemed necessary to incorporate into the sample a representation from different staff groups, and the use of some form of stratified sample was, therefore, indicated. The involvement of senior staff within the school in the selection of colleagues for interview was also necessary, for two reasons:-

- It was necessary, as part of the negotiation of access to the school, to cooperate in minimising the disruption to the daily functioning of the school. The organisation of an interview timetable was therefore the responsibility of the head or a deputy, and this needed to be designed with minimum disruption to lessons
- Senior staff have some prior knowledge of the range of views within the staff, and could be of assistance in ensuring the sample reflected the chosen stratification

A clear problem, however, with the involvement of senior staff in selecting colleagues was the danger of conscious or unconscious bias, perhaps in avoiding the selection of colleagues whose views did not conform with those of the senior management team. It is not possible to be wholly confident of the sample selection in this respect, but a number of strategies were used to minimise its effect. Firstly, the headteacher was made aware during the discussion of the sample selection that the interviewer regarded this as a potential problem, and was asked to assist in overcoming it. Secondly, the list of interviewees was shown to the deputy headteacher prior to the interviews, to gain a second view on the appropriateness of the sample. Thirdly, the list was shown to each

interviewed member of staff, and the chair of governors, at the end of the interview, and each was asked if they believed the list was a representative sample of staff and did not exclude any colleague with whom an interview would be of particular interest. Finally, it was not always possible, at the last moment, for nominated colleagues to be interviewed because of the intervention of other duties. Under these circumstances, the interviewer invited a replacement colleague at random to be interviewed, simply by asking those colleagues available in the staff room at the time whether they would be willing to be interviewed. This happened on two occasions, and each time the first member of staff to be invited was willing to participate.

The structure of the sample was as follows:-

- At least four members of staff, selected to include:-
  - one of the deputy headteachers where the deputies held no responsibility for any key aspects of marketing
  - at least one colleague with substantial service in teaching
  - one colleague who was a Newly Qualified Teacher (NQT)
  - one colleague with a role as head of department or head of year
- A member of the secretarial support staff, where possible the secretary with receptionist responsibilities
- The school's site manager or caretaker.

The interview schedule for the staff interviews is shown in Appendix 4. The questions are structured around three key themes - the interviewee's own understanding of and perceptions about marketing; a view of his / her own role in the process of marketing, and their training and preparation for it; and a view of the school's current marketing and external relations activities, and the management of them. Figure 5.4 shows a construction analysis for the interview schedule, and the relationship between its components and the key research questions.

Appendix 13 shows one example of a completed interview schedule for the staff sample interviews, together with the results of all the staff sample interviews in tabulated and categorised form.

Question Number	Summary of Main Question	Question Type	Research Questions Addressed	Notes
A1	What do you understand by the terms marketing, public relations, external relations, promotional activities ?	Structured Open	KQ, KQ3	
A2	How do you feel personally about the growth of marketing in schools ?	Open	KQ1, KQ3	
A3	How important do you feel marketing is to the well-being of the school ?	Open	KQ1, KQ3	
B1	What responsibilities do <b>you</b> have for marketing ?	Open	KQ2 SQ2.1,2.3	
B2	How important is <b>your</b> work within the school's marketing activities ?	Open	KQ2, KQ3 SQ2.1,2.3	
B3	What could be done to increase your effectiveness in those duties ?	Open	KQ2, KQ3 SQ2.4	
B4	What training, if any, have you had for your responsibilities ?	Open	KQ2 SQ2.4	

(Continued.....)

**Figure 5.4 Construction analysis table for staff sample interview schedules (1)**

Question Summary of Main Question Number	Question Type	Research Questions Addressed	Notes
(.....Continued)			
C1 How much discussion of marketing issues takes place..... - on school INSET days - in department / faculty meetings - in whole staff meetings - informally amongst staff ?	Structured Open	KQ2, KQ3 SQ2.2,2.5	
C2 How much influence does the staff have on school policy in marketing ?	Open	KQ2, KQ3 SQ2.1,2.3	

**Figure 5.4 Construction analysis table for staff sample interview schedules (2)**

### 5.7.6 Pupil and Parent Survey

A key element in the development of a marketing culture is the response of the potential customers / clients to the process and structure of the marketing process. A consideration of the attitudes of parents and pupils towards marketing by schools should be insightful, and should inform the planning of the process by the schools. The survey of parents and pupils was designed to investigate this dimension of their role as “customers”

The selection of an appropriate methodology and sample raised two key questions - what approach to data collection would be most appropriate, and what should be the characteristics of the sample. The selection of the sample was driven by a number of considerations:-

- the sample should be representative of a cross-section of pupils and parents in the school
- the sample should be large enough to provide meaningful data, yet small enough to facilitate data collection and data analysis.
- data collection should be designed to minimise disruption to the school
- since the focus of the study is on the recruitment of pupils at age 10 /11, the sample should represent those who had recently gone through the process of school selection

These constraints suggested the research should focus on the youngest children in the school (Year 7) who had engaged in choosing a school within the last twelve months. In each school children were placed in mixed ability tutorial groups, randomly mixed from different feeder schools, and so a single tutor group represents a cross-section of pupil intake. Tutorial groups were typically some 25 - 28 pupils in size, representing 10-15% of the Year 7 intake, and thus 2-3% of the school population. It was decided, therefore, that a single Year 7 tutorial group would provide an appropriate pupil sample. The specific group to be surveyed was selected by the researcher following discussion with the headteacher in each school. It was chosen to ensure that it was typical for



Year 7 in terms of size, ability range and sex, and where the group tutor was deemed by the headteacher to be a colleague who would be cooperative with the process of the research.

In selecting a parent sample, the limiting criteria applied in much the same way as for the pupils. In addition, it was seen that identifying the views of a set of parents whose children's views were also known would provide a useful insight into the broader "customer" response to marketing in Alceston. It was decided, therefore, that the parents of the Year 7 tutorial group chosen would represent the parental sample.

The method of data collection which would maximise response and the range of data that could be collected while at the same time minimising disruption to the school, was a questionnaire. For the pupils this was administered by the researcher during a single tutorial period, which meant that the response rate was in each case 100% from the pupils present on that day.

Access to the parental sample was achieved via the pupils. At the end of the tutorial period the pupils were given a sealed envelope to take home to their parents. This contained:-

- a covering letter from the researcher (Appendix 5) explaining the purpose and nature of the research and requesting their participation. It also explained the confidentiality of the exercise, and the support of the school for the research
- the questionnaire
- an envelope in which to seal their forms for return to the school

The questionnaires were returned by the pupils to their form tutor by a date some two or three days after the questionnaire was distributed. Form tutors agreed to remind pupils to return the parental questionnaires, and, once they had been collected, to return them unopened in bulk to the researcher.

The questionnaires used with the pupils and parents are illustrated

Question Summary of Main Question Number	Question Type	Research Questions Addressed	Notes
3 Who made the choice of which school you should go to ?	Multiple Choice	KQ2,KQ3	Four choices. Seeks to investigate who schools need to promote to
4 From where did you find out your information about the school when making your choice ?	Multiple Choice, Tier of Responses	KQ2 SQ2.3	Eleven choices, with three tiers of volume of information. Cross references schools views of promotion methods.

**NB This table contains only the information on those questions from this pupil questionnaire used within the present study**

**Figure 5.5 Construction analysis table for the pupil questionnaires**

Question Summary of Main Question Number	Question Type	Research Questions Addressed	Notes
3 Who made the choice of which school you should go to ?	Multiple Choice	KQ2,KQ3	Four choices. Seeks to investigate who schools need to promote to
4 From where did you find out your information about the school when making your choice ?	Multiple Choice, Tier of Responses	KQ2 SQ2.3	Twelve choices, with three tiers of volume of information. Cross references schools views of promotion methods.
9 (Attitude statements on marketing)	Scaled Response	KQ2,KQ3	Five positive and five negative statements about marketing, interspersed.

**NB This table contains only the information on those questions from this parent questionnaire used within the present study**

**Figure 5.6 Construction analysis table for the parent questionnaires**

in Appendices 6 and 7. These questionnaires were also used for a parallel survey exercise, which does not form part of the present study. Hence the questionnaires are more extensive than the reference within this thesis indicates. The whole questionnaires are illustrated in Appendices 6 and 7. A construction analysis for each of the questionnaires is shown in Figures 5.5 and 5.6. The pupil questionnaire was piloted with a group of ten Year 7 pupils in a school that was not part of the case study, and their comments were incorporated into the design. The parent questionnaire was piloted with an opportunity sample of twelve adults with secondary school age children within the researchers own locality.

Appendices 14 and 15 show the results from the pupil survey and the parent survey, respectively, in tabulated and categorised format.

### **5.8 Phase 3 - The Comparative Study**

The survey of the case study schools in Alcheston provided an in-depth perspective of the operation of marketing within a small, well-defined market. The nature of case study means that the generalisations that are drawn are difficult to extend to a wider perspective on the key issues. To provide a background against which the Alcheston case might be considered, the study took two approaches towards gaining a wider view of the operation of marketing in secondary schools - a small-scale case study of schools in two regions of England that differ from Alcheston in socio-economic terms (Manport and Norbridgeshire), and an expert survey of a number of individual schools that were active in the marketing field.

#### **5.8.1 The Manport and Norbridgeshire Studies**

The selection of locations and schools for a secondary case study phase of the research was dictated by two key factors - the need to choose areas contrasting in their geographical and socio-economic characteristics with Alcheston, and the pragmatic dimension of ease of access, both in terms of gaining the agreement of schools to cooperate and in terms of the researcher's own work. To facilitate comparison, however, it was felt

appropriate to consider only schools with essentially the same organisational structure ie 11-16 mixed comprehensive schools, feeding into a post-16 college system.

Alcheston is a large regional centre, with an affluent middle class population and a substantial commuter and dormitory role. As a contrast it was decided to seek one location that was within a large conurbation to provide a highly urbanised catchment area, and a second that was a rural or semi-rural location. In addition, it was felt appropriate that the Phase 3 case studies should be located outside southern England, preferably, one in the North of England and the second in central England. This drew the researcher to consider the city of Manport in north-west England, a large industrial conurbation of some 1.5 million population, and to the county of Norbridgeshire in Eastern England, a large rural county. Both have a secondary phase system based on 11-16 mixed comprehensive schools and sixth form colleges.

Contact with schools in each of these areas was made through the Secondary Heads Association(SHA). The national secretary of SHA provided contacts to the researcher in the regional SHA branches in Manport and Norbridgeshire, who, in turn, provided a list of schools and headteachers who might be willing to cooperate with the research. In choosing schools to approach, the main consideration was proximity of the schools to each other, and their operation in the same market place as each other. The regional SHA branch secretaries provided guidance on each of these issues. In each of the LEAs the researcher made telephone contact with the headteachers of six apparently appropriate schools, with a follow-up letter to those headteachers who expressed a willingness to consider the idea of participation further. From discussions with the headteachers by telephone, the suitability of the school for the case study was also considered. This process resulted in two schools in eastern Manport, and three schools in northern Norbridgeshire agreeing to be involved, although the precise nature of the involvement of each differed.

## 5.8.2 The Manport Case Study

### a) Introduction

The case study in Manport used two schools in Gratton, an area of private and local authority housing dating from the 1930s around a core of a 19th century industrial village. The area had been incorporated into the city as a result of urban growth during the nineteenth and twentieth century. Data available from one of the two case study schools showed the area to comprise mainly socio-economic classes 3 and 4 (75% of the population of the wards that provide the natural catchment for the two schools), with an unemployment rate of about 40%.

The two schools lie about one mile apart, but serve different areas of Gratton. Bycars School draws its children mainly from the older industrial part of Gratton and from the local authority housing areas. Hillview School is at the edge of the small areas of 1960s suburban development, and draws its children mainly from the areas of private housing in Gratton.

Figure 5.7 shows the profile of the schools in terms of selected indicators. The market within which they operate is highly competitive, for a number of reasons. Firstly, Manport LEA serves an inner city area that has steadily been losing population to suburban areas and satellite towns in recent decades. The population of Manport declined by 12.1% in the period 1981-91 (Geographical Digest (1994)), and that decline has continued into the 1990s. Secondary age pupil numbers in the LEA fell by 4% in the period 1991-94 (DfE (1994)), and this has resulted in substantial competitive pressure between schools. Secondly good transport makes travel out of Manport into neighbouring LEAs very easy, and the better reputation of schools in those 'middle class' neighbouring LEAs makes leakage of pupils very common. Thirdly, Manport's schools score less well in indicators of school output than do those in neighbouring authorities. Fourthly, a high density of schools within Manport with good communication links makes competition within the authority quite strong - most schools are accessible to most pupils.

School	Number On Roll		% Change 1991-94	GCSE Passes				Absences (% Half Days) (1994)	Statemented Children (1994)
	1991	1994		1992 % A-C	1992 %A-G	1994 % A-C	1994 %A-G		
<b><u>MANPORT</u></b>									
<b>Bycars School</b>	880	810	- 8.6	7	44	11	57	5.6	3
<b>Hillview School</b>	1031	1165	+ 12.9	16	54	27	66	n.a.	2
<b>LEA Area Average</b>			- 4.0	19	60	23	67	4.0	
<b><u>NORBRIDGESHIRE</u></b>									
<b>Chalklands School</b>	900	929	+ 3.2	57	92	54	91	0.2	10
<b>Fenside School</b>	630	717	+ 13.8	38	91	49	94	1.1	22
<b>The Abbey School</b>	500	522	+ 4.4	19	76	24	75	1.4	17
<b>LEA Area Average</b>			+ 2.0	39	87	43	88	0.8	

**Figure 5.7 Profile of the Manport and Norbridgeshire case study schools**

## **b) The Case Study Schools**

### **i) Bycars School**

Bycars School has two sites half a mile apart. The older building, described by the headteacher as "architecturally bizarre", dates from 1932, and houses the upper school of Years 10 and 11. The lower school (Years 7, 8 and 9) occupies the former secondary modern school built in 1938. Building developments on the upper school site have meant that the school has occupied a single site with effect from September 1994.

The school recruits up to its standard number of pupils in most years, but up to 30% come from out of catchment. The headteacher perceives this as the result of large leakage of pupils within Gratton to the main competitor schools, balanced by pupils coming from areas nearer to the city centre where the schools are regarded as less attractive. The school is situated on major public transport routes, and so is readily accessible to such pupils. Despite its location in a varied multi-ethnic area of the city, the school attracts few West Indian children and almost no Muslim pupils. The school changed from 11-18 to 11-16 as a result of reorganisation of post-16 provision in Manport in 1982. The headteacher was appointed in 1972, and retired in July 1994.

### **ii) Hillview School**

Hillview School is a purpose built comprehensive school opened in 1967 on a spacious campus with attractive panoramic views. Its facilities are modern and include an indoor heated swimming pool, a music suite and a drama studio. It became an 11-16 school in 1982 as a result of post-16 reorganisation, but remains the largest comprehensive school in Manport with a roll of about 1150 pupils. It has plans to develop its own sixth form within the next two years, with the backing of the LEA. After a period of steadily declining rolls, the appointment of a new head in 1990 precipitated a pro-active promotional and recruitment move by the school, resulting in a rapid increase in pupil numbers in the period 1990-94.



### **c) Methodology**

The research in the two case study schools was conducted during July 1993. The methodology consisted of the following tasks:-

- An extended interview with the headteacher at the commencement of the period in each school. This was conducted in the same way as the interviews in Alcheston, with the interview recorded by interviewer notes. The interview schedule was the same as for the Alcheston interviews. The second part of the interview was conducted at the end of the period in school to allow reflection on issues that had emerged from the rest of the research in the school.
- An interview with the member of staff with responsibility for marketing. At Hillview School this was a senior teacher who worked as part of the SMT, while at Bycars School it was a colleague operating at middle management level with an allowance for school-community links. The interview method employed was the same as that used with deputy heads in the Alcheston case study.
- An interview with a cross-section of staff. The same approach to selecting staff for this interview was used as for the Alcheston case study. At Bycars School six members of staff were interviewed, and at Hillview School the figure was four. In neither case was it possible to interview colleagues from the support staff in the school.
- An interview with the chair of governors was arranged in each school. Unfortunately, in the case of Bycars School this was cancelled by the chair at short notice because of other commitments, and the interview did not, therefore, take place. The interview schedule used with the chair of governors at Hillview School was the same as that used at Alcheston.

### **5.8.3 The Norbridgeshire Case Study**

#### **a) Introduction**

Norbridgeshire is a large county in eastern England. Much of the county is based on a rural, agricultural economy with market towns, but the major urban centres in the south and west of the county have been major economic growth areas based on high technology industry during the 1980s. The population of the county grew, as a result, by 10.6% in the period 1981-91, with expansionary pressures on most local authority services, including education. Even with negative national demographic trends in the school population in the early 1990s, pupil numbers in Norbridgeshire grew by 1.9% in the period 1991-94 (DfE (1994)).

The case study in Norbridgeshire focused on three mixed 11-16 comprehensive schools in the north-east of the county. Two of these are rural community schools serving a large "catchment" centred on the small village in which the school is based. The third is in the nearest urban centre, but serves the urban fringe and because of transport connections offers potential competition to many of the schools in the adjoining rural area.

Figure 5.7 shows a number of indicators on intake and results for comparative purposes. The market within which the schools operate is quite competitive, for each of the schools has at least one competitor to which pupil access is easy - in a neighbouring village, or in the nearest towns. Differentiation seems to characterise the Norbridgeshire market, too, for each school appears to emphasise its distinctiveness in different terms. Fenside School's competitors, for example, include a GM school emphasising its long academic history as a grammar school prior to comprehensive reorganisation, and an 11-18 comprehensive school in the nearby town which emphasises its excellent results at 18.

## **b) The Case Study Schools**

### **i) Fenside School**

Fenside School is a purpose built comprehensive school with modern buildings, an attractive campus and a new music and drama suite and sports hall opened in 1993. Its roll is approximately 700, and it draws from a very large rural catchment. A substantial proportion of the population in the catchment works in rural industry or agriculture, while the rest comprises middle class rural commuters travelling into the nearby market centre (4 miles distant) and the regional city (15 miles distant). The headteacher had been in post for some five years.

### **ii) Chalklands School**

Chalklands School is a purpose built community college opened in 1937, but with substantial rebuilding providing a modern campus school. Its roll is 920, and the school serves a large rural area including 21 separate villages. It lies midway between the regional city centre and a significant local market town. The socio-economic structure of its catchment is mixed and includes a large number of pupils from an agricultural community. However, most parents of the school's children are rural commuters who work in accessible urban centres. A number of pupils travel daily from the nearest city to the school, which has a high quality reputation within the LEA for the quality of its provision. The headteacher had been appointed to the school within the previous year.

### **iii) The Abbey School**

The Abbey School is in the north-eastern suburbs of the regional city which acts as the administrative and economic centre of Northbridgeshire. It occupies buildings dating from the 1930s, and comprised separate boys and girls secondary modern schools prior to merger in 1966 and comprehensive reorganisation in 1979. It is now a city community college. Substantial expenditure in the last decade has

upgraded the quality of the buildings and facilities. The number on roll is approximately 500, drawn principally from the local city community, but includes pupils commuting from the adjoining rural areas. The headteacher was in her fourth year in post, and had taken over the school after a period of instability because of the illness of a previous head and two brief appointments to the post.

### **c) Methodology**

The research in these three case study schools was conducted during June 1993. The precise nature of the data collection process differed between the schools because the head and governors of each school offered differing degrees of involvement in the research. None of the schools was willing to involve staff beyond the headteacher. In addition, only Fenside School was willing to allow the operation of the pupil / parent data collection, while only The Abbey School chair of governors was available for interview. The methodology, therefore, consisted of the following tasks:-

- An extended interview with the headteacher at the commencement of the period in each school. This was conducted in the same way as the interviews in Alcheston, with the interview recorded by interviewer notes. The interview schedule was the same as for the Alcheston interviews. Where other research activities were undertaken in the school a second part of the interview was conducted at the end of the period in school to allow reflection on issues that had emerged from the rest of the research.
- An interview with the member of staff with responsibility for marketing. At Fenside School and Chalklands School this was the headteacher, while at The Abbey School it was the finance officer who also chaired the Marketing Group. Only in the latter case, of course, was a separate interview undertaken.
- An interview with the chair of governors was arranged in each school. Unfortunately, in the case of Fenside School and Chalklands School this

was not made available during the visit to the school, and the interview did not, therefore, take place. At The Abbey School the interview was conducted with two governors, one of whom was the chair of governors, and the other of whom was the second governor on the school's marketing committee. The interview schedule was the same as that used at Alceston.

#### **5.8.4 The Expert Survey**

To place the analysis of the Alceston case study, and the follow-up studies in Manport and Norbridgeshire, into the context of a broader picture of practice, it was felt to be important to have some insight into the understanding of and practice of marketing on a wider scale. In particular, the need to gain a view of the most developed practice in this field was seen to be important - as a model against which to compare practice within the case study schools. To gain a picture of the most developed practice it was considered appropriate to undertake a limited Delphi Study.

A Delphi Study (Gray (1991)) is designed to elucidate the views of a selected range of individuals with acknowledged expertise or authority in the specific field under consideration. It is, in essence, a sampling method that is not based on the concept of a representative sample - it is a sample of those whose views and perceptions might be regarded as authoritative. Cohen and Manion (1994) consider the role of authoritative insight as one of the two dimensions of experience within the Experience - Reasoning - Research origination of understanding in any dimension of social science or science. This authority is most frequently derived from published material, but must be deemed to be also appropriate if emanating directly from individuals. Mouly (1978) indicates that:-

“Experts are essential, particularly in a complex culture such as ours, where knowledge is expanding so rapidly that no one can be an expert at everything. And obviously, some individuals have such wide experience and deep insight that their advice can be of immense benefit”

(Mouly (1978): 32)

Expertise, however, must never be accepted uncritically, and has a number of inherent dangers, for as Mouly emphasises.....

“.....it must be remembered that no-one is infallible, and even the best and most competent are not exclusive possessors of the truth, the whole truth and nothing but the truth,.....(and) authorities have been known to change their mind”

(Mouly (1978): 32)

Expertise in the field of educational marketing is superficially elusive, in part because of the short history of the field, but mainly because of the lack of published, refereed material that may be deemed to be authoritative by virtue of its academic credentials. The published material that does exist is also very focused on the nature of markets or parental choice rather than the practice of marketing. It seemed appropriate, therefore, to look in other directions for the source of expertise, and three routeways were followed.

Firstly, it was considered that the professional educational press would contain reference to expertise in the field. The Times Educational Supplement was reviewed over the period from 1990 to 1993 to identify individuals or schools whose practice in the field of marketing had been noted. This included:-

- schools achieving awards for marketing or public relations practice
- schools where developments in the field of marketing had attracted the interest of the media
- schools whose senior staff had engaged in public discussion of marketing issues through articles within the Times Educational Supplement or through the correspondence columns.

Secondly, reference was made to the small number of publications in the field of marketing practice (eg Davies and Ellison (1991); Marland and Rogers (1991)) to identify schools or individuals whose practice was

included to exemplify key ideas within the text.

Thirdly, those contributing to public events in the field of marketing, such as courses or conferences, that were publicly advertised during the period 1990-1993 were noted.

The list of experts compiled was restricted to those individuals working within schools, and specifically excluded other groups such as consultants or advisers. Where schools rather than individuals were identified it was assumed that the headteacher or principal would be the point of contact. In this way it was considered that the experts for survey would be those...

- who had dealt with marketing issues within a secondary school from the perspective of the management teams within the school
- who had addressed marketing issues in a way which had required them to consider the fundamental issues about the nature and practice of marketing
- whose practice or views in these areas were deemed by a third party (the media, or a professional body, or their peers) to be worthy of public note

By these means a list of 25 experts was identified for the modified Delphi Survey, which is referred to here as the 'expert survey'.

The key purpose of the expert survey was to identify a broad picture of current marketing practice, and to elucidate the interpretations of expert practitioners about the meaning of marketing, how it was organised in their own institution, and its role and function within the current management of schools. This was undertaken by means of a questionnaire, which is illustrated in Appendix 8. The questionnaire's design and structural characteristics are illustrated in Figure 5.8. The questionnaire was piloted before use by testing with five MA students on the "Marketing" course unit .

Question Number	Summary of Main Question	Question Type	Research Questions Addressed	Notes
1	Please provide the following descriptive information about your school ( name; age range; type; designation; roll; standard number; "out-of-catchment" children numbers; roll trend)	Completion	-	Provides basic data as background
2	What do you understand by the terms 'marketing', 'public relations', 'external relations' and 'promotion' ?	Open, Structured	KQ1	
3	How is the management of marketing in your school organised ?	Multiple Selection	KQ2 SQ2.1	Seven categories plus an open response category.
4	How far is marketing an integral part of school planning ?	Multiple Selection	KQ2 SQ2.2	Six categories
5	Why has the school developed the marketing practice and policy that now operate ?	Multiple Selection / Ranking	KQ1, KQ2 KQ3	Nine categories plus an open response category. Mix of push and pull factors. Ranking in order.

(Continued.....)

**Figure 5.8 Construction analysis table for the expert survey questionnaire (1)**



Question Number	Summary of Main Question	Question Type	Research Questions Addressed	Notes
(.....Continued)				
6	What experience of training in the field of external relations and marketing do key staff have ?	Structured Multiple Selection	KQ2 SQ2.4	Five categories for each of three key staff
7	What staff development activities have been organised to support marketing in the school ?	Multiple Selection	KQ2 SQ2.4	Six categories plus one open response category
8	Which activities does your school engage in as part of its marketing activities ?	Multiple Selection / Ranking	KQ2 SQ2.3	Twenty six categories with ranking by two criteria
9	How do you evaluate your marketing practice and plan for the future ?	Scaled Response	KQ2 SQ2.5	Nine categories each with four point scale response plus open response category.
10	How does your school budget for marketing / external relations ?	Multiple Choice	KQ2 SQ2.2	Six categories

**Figure 5.8 Construction analysis table for the expert survey questionnaire (2)**

Access to the experts was achieved in the following way. An initial telephone conversation with each individual checked their willingness to be approached, explained the purpose of the survey, and ensured that the questionnaire was recognised when it was received. The questionnaire was then posted to all 25 individuals, each of whom had agreed to complete it, with a covering letter (Appendix 9) to remind them of the purpose of the survey. Those individuals from whom no response had been received after two weeks were telephoned to remind them, and in two cases where the questionnaire had not been received a replacement was sent. Those individuals from whom a response had not been received after four weeks were sent a further questionnaire with a letter explaining the value of a complete set of responses. This process resulted in 18 of the 25 'expert' questionnaires being returned, a response rate of 72%

#### **5.8.5 Summary of Phase 3**

Phase 3 of the study extended the case study of the Alcheston schools in Phase 2 by the use of comparative case studies in Manport and Norbridgeshire, and by the use of a modified Delphi survey (the expert survey) with a sample of 25 headteachers. The data from these elements of the study is presented in Appendices 13,14,15,16,17,18 and19.

#### **5.9 Phase 4 - Analysis**

Phase 4 of the research programme represents the summative analysis of the data and the conceptual development that arose from this. This process had, in fact, been continuing throughout each phase of the research, for the findings of each phase informed the planning and method of each subsequent stage. However, on completion of the data collection and fieldwork elements of the study it was essential to draw out the key ideas that had emerged. The data and analysis is presented in later chapters.

## **5.10 Summary**

This chapter has described the research methodology employed within the case study, and the philosophical and practical issues that directed its design and implementation. The study focused on three key questions which had emerged from preliminary interviews and a literature survey, and investigated them by means of an 'integrated case study survey approach'. An initial case study of three schools in Alceston (Phase 2) was extended and supported by a comparative study, by case study, of two schools in urban Manport and three schools in rural Norbridgeshire, and also by a modified Delphi approach (the expert survey) in Phase 3. Chapters 6, 7 and 8 will present and consider the results of the study.



**CHAPTER  
6**

**Results / Analysis 1 - The Concept of Marketing in Schools**

## Chapter 6

### Results / Analysis 1 - The Concept of Marketing in Schools

#### 6.1 Introduction

Chapter 5 considered in detail the research process and methodology used within the study, and analysed a range of issues in both the planning and implementation of the research investigation. Chapters 6,7 and 8 present the results of the data collection process and analyse the findings in relation to the Key Questions identified in Chapter 5. Chapter 6 considers KQ1, Chapter 7 examines KQ 2, and Chapter 8 considers KQ3. The results from each element of the data collection process that relate to the specific key question are presented, and are then analysed to draw out the main findings. Chapter 9 considers the findings of the whole research programme and seeks to draw out significant insights and ideas from across the range of the three Key Questions.

Key Question 1 (**KQ1**) is the focus of this chapter and asks.....

**How is the concept of marketing received and understood in schools ?**

Initial insights from Phase 1 of the study suggested that there exists a range of perceptions of the nature of marketing, and that the interpretation of the concept in schools is extremely varied. This question considers the differences of interpretation to understand the conceptual background against which marketing practice has developed. Cowell (1984) has suggested that the development of a marketing culture within an organisation is dependent upon the presence of four key elements (see Chapter 2), of which the first is the presence of an 'attitude of mind' throughout the organisation which is essentially customer and market focused. This Key Question seeks to identify the nature of this characteristic in schools. Two sub-questions have been identified, i.e.

**a) (SQ 1.1) How do different stakeholders in schools perceive the concept of marketing ?**

**b) (SQ 1.2) Are there common themes in the understanding of the idea that might enable a model of the conceptualisation marketing in schools to be identified ?**

This chapter considers the evidence base from the research programme that relates to perceptions of the concept of marketing and to the attitudes of stakeholders. It then examines the key questions with specific reference to its component sub-questions.

## **6.2 Marketing, Perceptions and Attitudes - The Evidence Base**

The perceptions of the concept of marketing of a range of stakeholders was considered through a number of components of the research. The range of stakeholders for every school is large, and Devlin and Knight (1990) have identified a simple typology. Internal audiences are those working within the school (eg pupils and teachers) or which are part of the 'school family' (eg parents and governors), while external audiences are those beyond the school - for example, LEA officers, local politicians or OFSTED. In focusing principally on the 'supply side' of the school market this study considered the perceptions of, mostly, internal audiences - headteachers, senior staff with marketing responsibilities, teaching and non-teaching staff, and pupils from the 'immediate school family' (Devlin and Knight (1990): 16), and parents and governors from the 'extended school family'.

These perceptions were explored through the following :-

- The headteacher interviews in Alcheston, Manport and Norbridgeshire
- The staff interviews in each of the case study schools
- The marketing manager interviews
- The interviews with the Chairs of Governors
- The 'expert survey'.

With the exception of the pupil and parent questionnaires, the data on perceptions of marketing was derived from an open question within the interview schedule or questionnaire. Question 1a within each of the headteacher, chair of governors and marketing manager interview schedules (Appendix 3) asked "What do you understand by the term "marketing" ? Question 1b in the same interview schedules asked the respondent to indicate their understanding of the terms "public relations", "external relations" and "promotion". Within the staff sample interviews (Appendix 4), Question 1 asked "What do you understand by each of the following terms - "marketing", "public relations", "external relations" and "promotional activities" ? Within the expert survey (Appendix 8), Question 2 asked "Please indicate...what you understand by each of the following terms - "marketing", "public relations", "external relations" and "promotion" ?

The majority of these questions generated qualitative data, which required careful analysis to identify key themes. The approach used was that of "categorization of content" (Kitwood (1977)) in which "the content....is inspected and an attempt is made to develop some categories into which all the material will fit" (Cohen and Manion (1994): 210). To safeguard, as far as possible, against unrecognised researcher bias in this categorization a third party was asked to consider the classifications derived from a sample of the interview summaries. This resulted in a process of modification of categories to produce the final classification used. The categories for each of the questions are indicated below and against each of the possible answer groups is written in bold a summary term which is used in the graphs to facilitate interpretation:-

- In relation to respondents' overall understanding of the concepts, three groups of answers were identifiable...

A- The respondent shows little or no understanding of any of the terms 'marketing', 'public relations', 'external relations' or 'promotion'  
**(None)**

B - The respondent regards all the terms as having the same meaning  
**(Same)**

C - The respondents indicate some distinction of meaning between the terms  
**(Distinct)**

• In relation to respondents' understanding of the concept of 'marketing', five groups of answers were identifiable...

A - Marketing means selling i.e. recruiting pupils to the school **(Sell)**

B - Marketing means selling plus good external communication about the school **(Sell + Tell)**

C - Marketing means meeting customer demands, needs and / or wants.  
**(Client)**

D - Other answers describing the meaning of marketing **(Other)**

E - The respondent provided no answer **(None)**

• In relation to respondents' understanding of the concept of 'public relations', five groups of answers were identifiable...

A - Public relations means the same as marketing **(Mktg)**

B - Public relations means communicating with the outside world beyond the school **(Comms)**

C - Public relations means creating a good image of the school for the outside world **(Image)**

D - Other answers describing the meaning of public relations **(Other)**

E - The respondent provided no answer **(None)**

• In relation to respondents' understanding of the concept of 'external relations', four groups of answers were identifiable...

A - External relations means the same as public relations **(PR)**

B - External relations means the whole range of the externally-focused activities of the school **(ER)**

C - Other answers describing the meaning of external relations **(Other)**

D - The respondent provided no answer **(None)**



- In relation to respondents' understanding of the concept of 'promotion'. Six groups of answers were identifiable...

A - Promotion means selling i.e recruiting pupils. (**Sell**)

B - Promotion means the same as marketing (**Mktg**)

C - Promotion means telling people about the activities and events of the school (**Tell**)

D - Promotion means persuading people to 'buy' or 'use' some element of one of the school's activities or events (**Buy**)

E - Other answers describing the meaning of promotion (**Other**)

F - The respondent provided no answer (**None**)

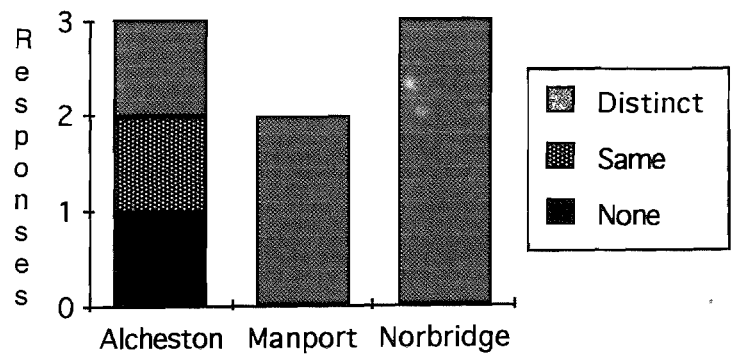
The following sections consider the results of this analysis for each of the main participant groups in the study.

## **6.3 Perceptions in the Case Study Schools**

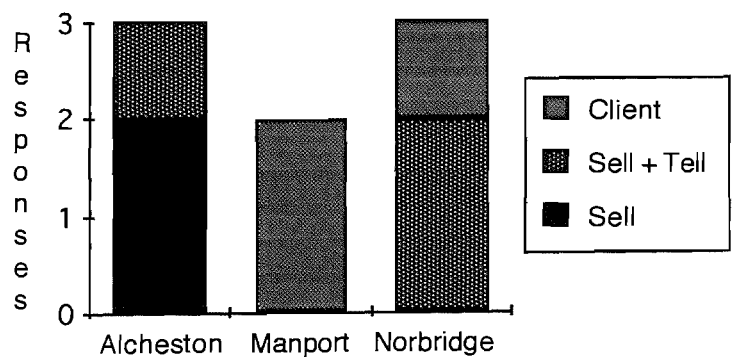
### **6.3.1 The Perceptions of Headteachers**

The graphs in Figure 6.1 show the perceptions of headteachers in the eight case study schools in relation to the key terminology in the field of education marketing. The data relates to their specific understanding of the terms 'marketing' (Figure 6.1b), 'public relations' (Figure 6.1c), 'external relations' (Figure 6.1d) and 'promotion' (Figure 6.1e), together with their overall understanding of the nature of these terms (Figure 6.1a). Each graph distinguishes in the key between the three case study locations, and omits categories in which there was no response.

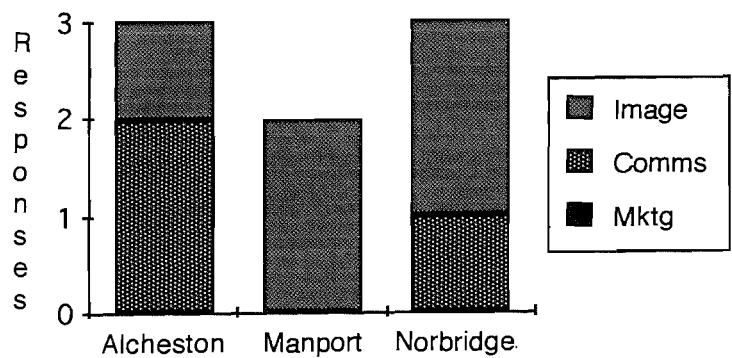
Each of the graphs suggests a range of understanding across the headteachers. Two of the eight headteachers, both from Alcheston schools, see the concept simply in terms of 'selling' the school and recruiting more pupils (a sales-focused approach). The headteacher of The Lee School, for example, describes marketing as "persuading parents and kids to come here". A contrasting view sees a wider focus of marketing suggesting a



**a) Overall view**



**b) Marketing**

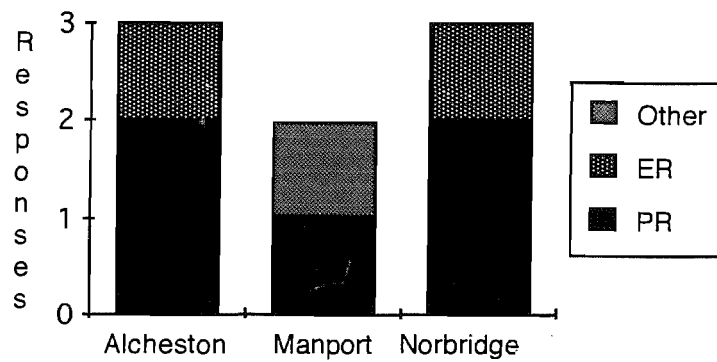


**c) Public relations**

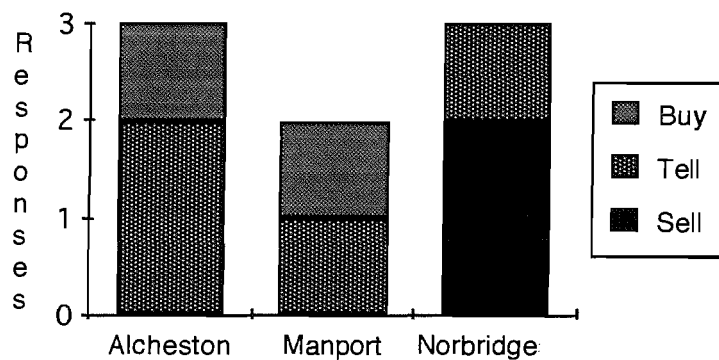
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**Figure 6.1 Perceptions of the headteachers in the case study schools (1)**

(.....Continued)



**d) External relations**



**e) Promotion**

**Figure 6.1 Perceptions of the headteachers in the case study schools (2)**

'client focused' way of operating. Three headteachers expressed such a view, including the head of Bycars School who perceived marketing as "fostering parental participation, saying what is good and winning hearts and minds".

The Alcheston headteachers were asked the same question during the final interviews conducted towards the end of the research programme. At that stage their responses were categorised as one in Category "Sell" and two in Category "Sell + Tell". This change in the broad pattern reflected a changed understanding of the term from one of the three headteachers,

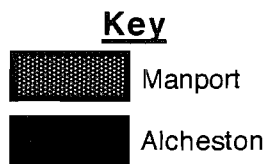
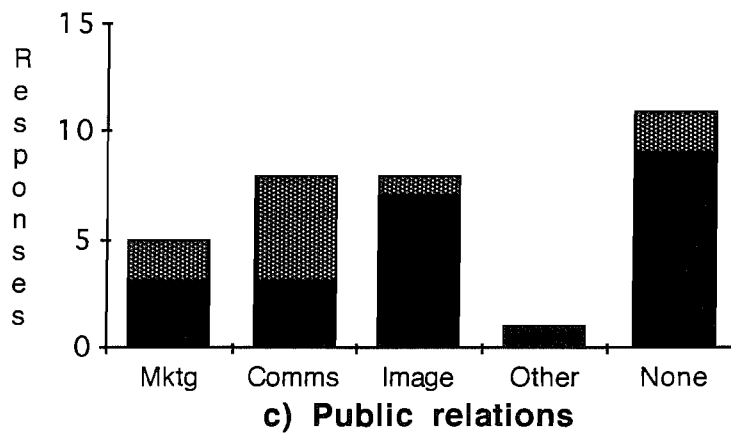
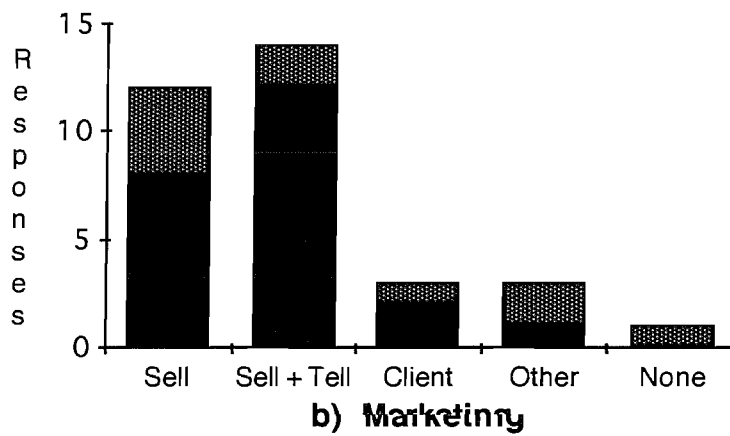
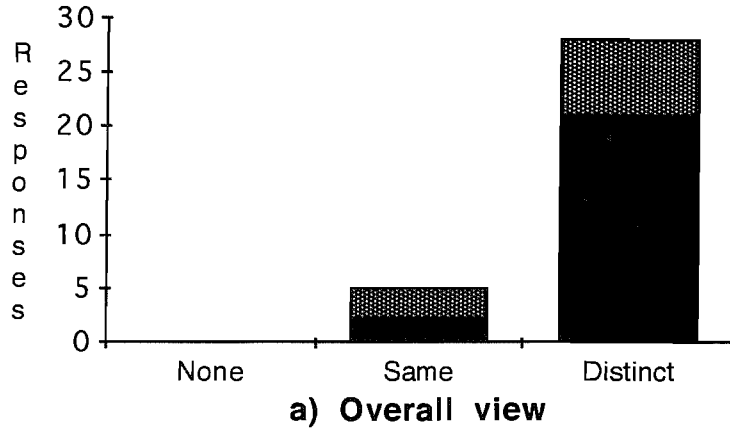
but might tentatively suggest a process of development in understanding marketing.

The headteachers' understanding of 'public relations', 'external relations' and 'promotion' is similarly varied. All identified 'public relations' as involving communicating to the outside world ('Comms' and 'Image' in Figure 6.1c), although most (5 out of 8) did not distinguish between public relations and external relations. In terms of 'promotion' there was a wide range of understanding.

Despite the variation in understanding of the individual terms, the overall view (Figure 6.1a) was that there was some distinction between the terms. In Manport and Norbridgeshire all the headteachers identified a difference between the terms, while in Alcheston there was much greater variation - one headteacher showed little or no understanding of the terms, and a second indicated that all meant the same thing.

### **6.3.2 The Perceptions of the Staff Sample**

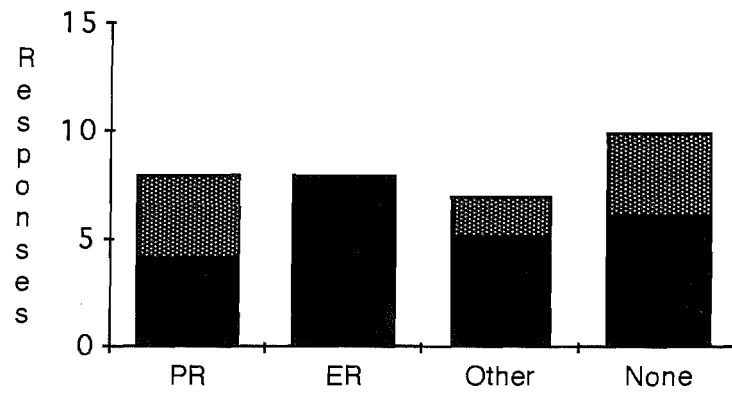
The graphs in Figure 6.2 show the perceptions of the concepts of marketing by the staff sample from the case study schools, although this data was available only from the schools in Alcheston and Manport. As with their headteachers, there is a range of understanding of the key concepts, although this range is wider amongst the staff sample. Amongst the headteachers each data set covers only a maximum of three categories, whereas with the whole staff the data ranges across four or five categories, except for their overall view of 'marketing' (Figure 6.2a). Of particular note is the fact that many staff have little or no understanding of the terms 'public relations', 'external relations' or 'promotion', which suggests, overall, a limited exposure to reflecting on the nature and purpose of marketing in their school. In Figure 6.5 the data is displayed grouped by schools. In each of the charts in Figure 6.5 there is a range of response within each school. For example, the respondents' understanding of the concept of marketing (Figure 6.5b) falls into three categories for Castle School, Downsview School and Hillview School, and into four categories for Bycars School.



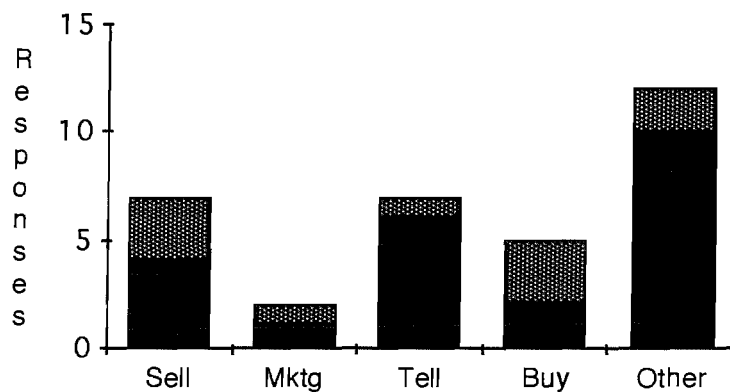
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**Figure 6.2 Perceptions of the staff sample (1)**

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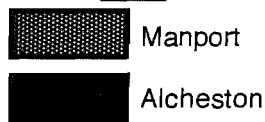


**d) External relations**



**e) Promotion**

**Key**



**Figure 6.2 Perceptions of the staff sample (2)**

Only in the case of Lee School do the responses fall into only two categories.

The interviews were undertaken with a cross-section of staff, in terms of role, seniority and involvement with marketing. Appendix 13 shows the tabulated responses of these interviews. The individual responses do not enable a link between particular staff groups and particular perceptions to be identified. At Downsview School, for example,

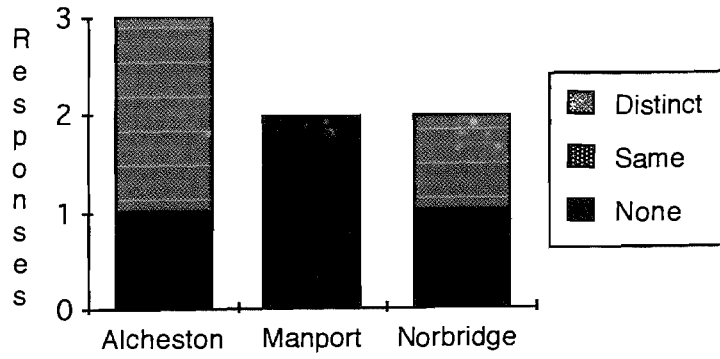
a teacher with an involvement in marketing with responsibility for display work around the school defined marketing as “selling and devising things to attract people in” (a ‘selling’ orientation) and had no understanding of the terms ‘public relations’, ‘external relations’ or ‘promotion’. In contrast, a main scale teacher of English with no specific responsibility or background in marketing provided quite precise distinctions between the terms, with a view that “marketing is vital, for the school needs to be responsive to the market and maintain good relationships with the community”.

In each case, though, it was possible to identify reasons why the respondent did or did not have an understanding of the key ideas, mostly to do with their own personal academic or career background. For example, the three teachers of business studies interviewed across the five schools all provided clear and precise definitions of the terms, which might be explained by their academic training. A second example is the six of the thirty three interviewees who were themselves parents of secondary age children. As a group they were able to distinguish clearly between the terms, perhaps reflecting their experience of interacting with schools both as teachers and as parents. A group with relatively limited ability to distinguish between the ideas were heads of academic departments whose subject focus or responsibilities did not involve marketing.

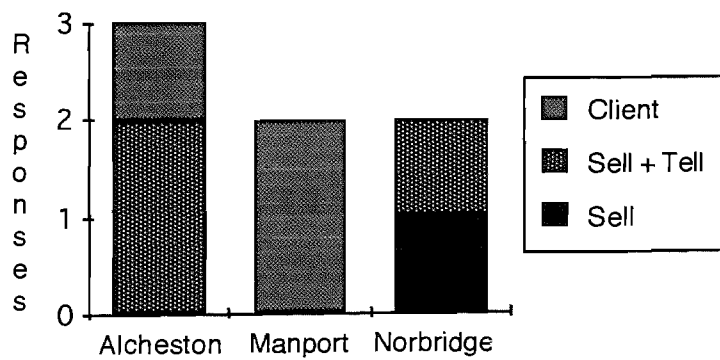
### **6.3.3 The Perceptions of the ‘Marketing Managers’**

The schools’ marketing managers were those staff, other than the headteacher, with the lead role in coordinating marketing by the school. In three of the schools this was a deputy headteacher, with the other schools allocating the role to a senior teacher (one school), the finance officer (one school) and the colleague with responsibility for community links ( a middle management post). In one school the headteacher retained responsibility for the role pending a review of senior management roles.

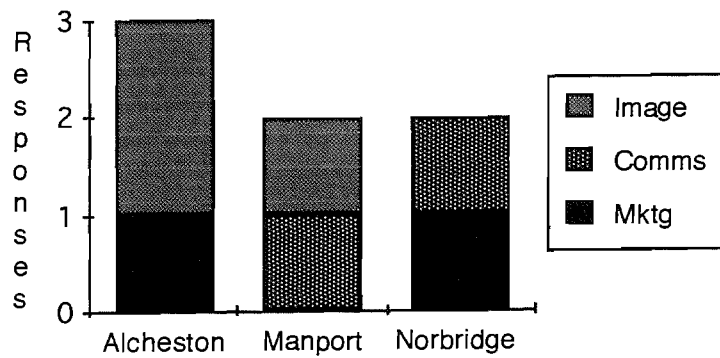
The graphs in Figure 6.3 display the pattern of understanding of ‘marketing’ ideas by the marketing managers. As with the data for the headteachers and the staff sample interviews, the graphs suggest a range



**a) Overall view**



**b) Marketing**



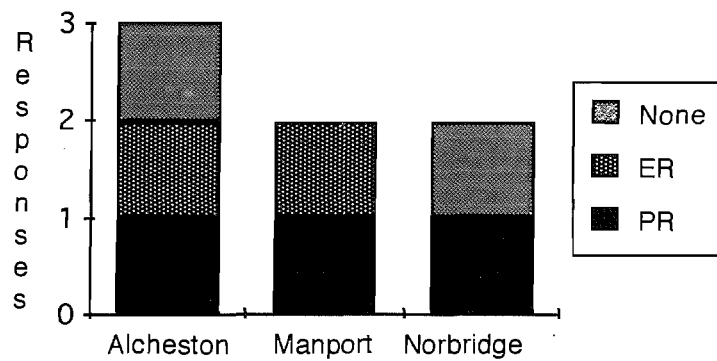
**c) Public relations**

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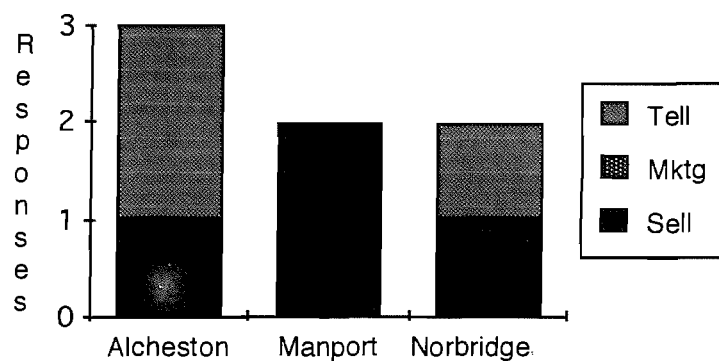
**Figure 6.3 Perceptions of the 'marketing managers' in the case study schools (1)**



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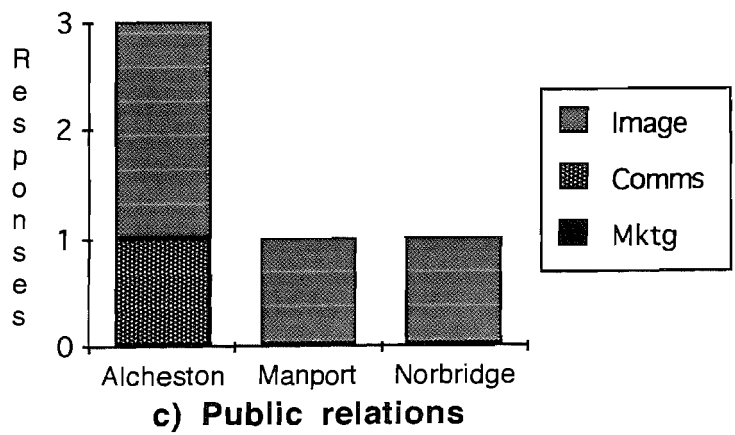
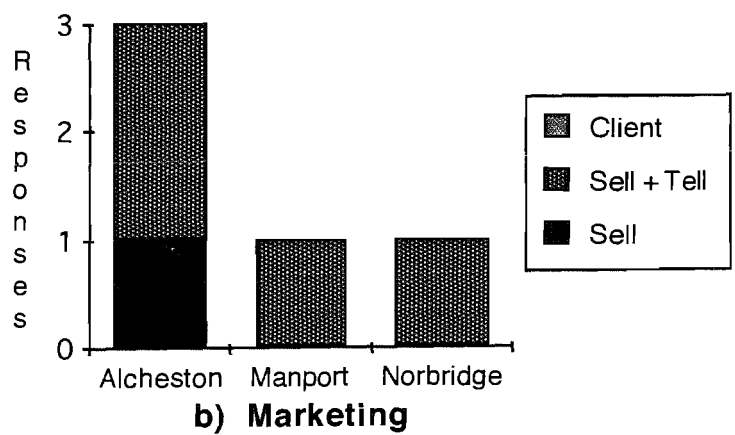
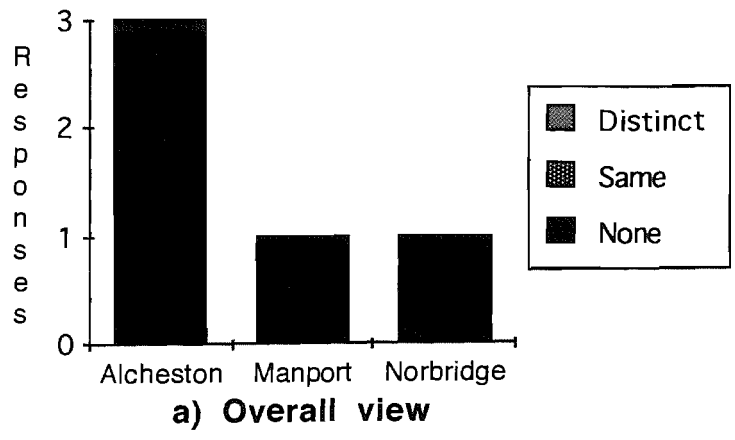
**d) External relations**



**e) Promotion**

**Figure 6.3 Perceptions of the 'marketing managers' in the case study schools (2)**

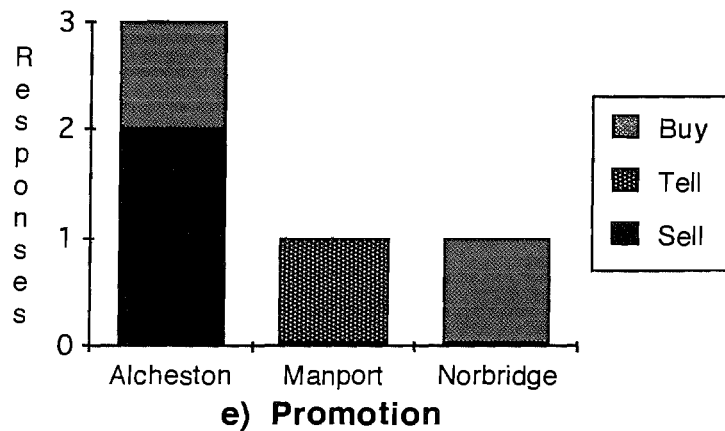
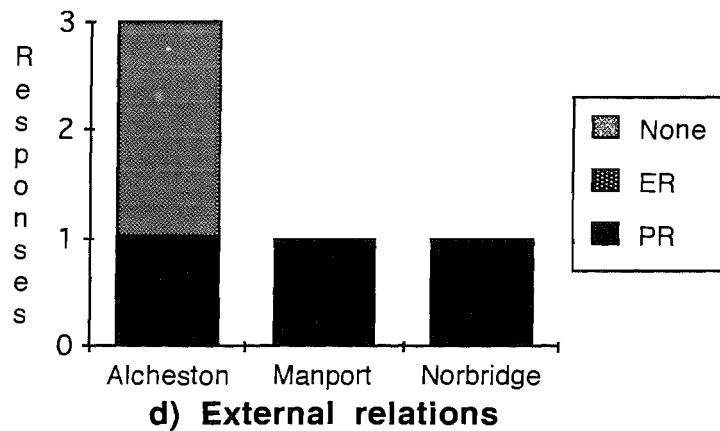
of understanding of the main terms. It might be reasonable to assume that those with responsibility for marketing would have a more refined, clearer understanding of terminology in the field than most other groups within the study. However, the data provides no evidence to support this view, for their understanding appears just as varied as, for example, that of the broad cross-section of staff. Of some interest is the graph in Figure 6.3a which indicates that 4 of the seven 'marketing managers' interviewed showed little or no understanding of any of the terms (Category A).



(Continued.....)

**Figure 6.4 Perceptions of the chairs of governors in the case study schools (1)**

(.....Continued)



**Figure 6.4 Perceptions of the chairs of governors in the case study schools (2)**

### 6.3.4 The Perceptions of the Chairs of Governors

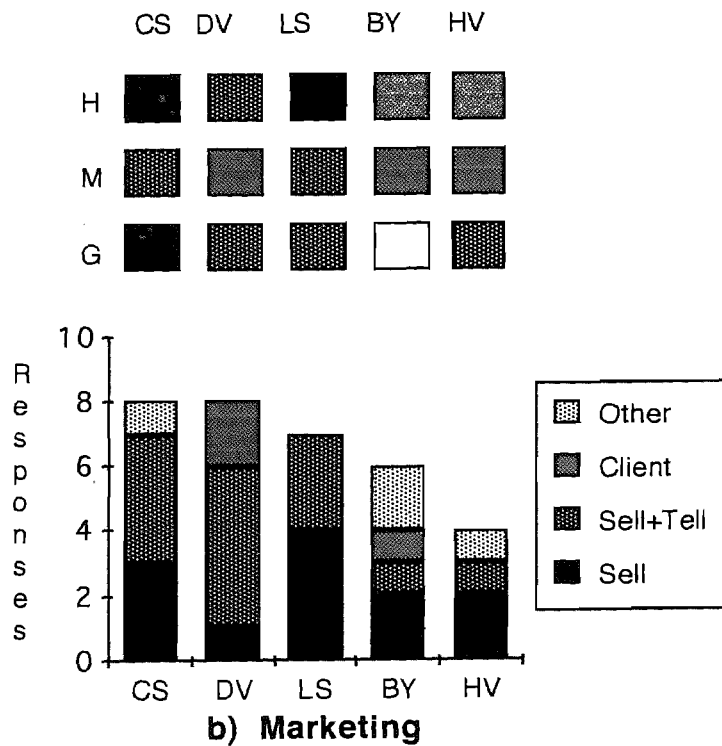
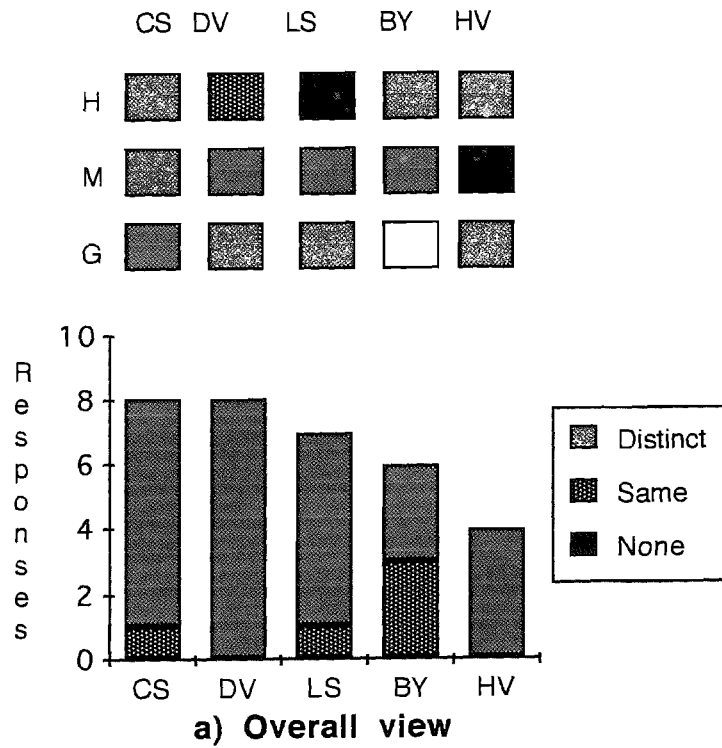
The Chair of Governors was interviewed in each of the Alcheston case study schools, and in one school in both Manport and Norbridgeshire. All were from the business community, with three running their own small businesses, one working in a senior position within a small business, and one (the Chair at The Abbey School) the Managing Director of a large regional company. The graphs in Figure 6.4 present their understanding of the terms 'marketing', 'public relations', 'external relations' and 'promotion'. With the exception of the data for their understanding of 'promotion', there is some consistency in their views. All distinguish between the various

terms, and four of the five see marketing as a combination of “selling” the school’s educational provision and providing good external communication about the school. Most saw public relations as about creating a good image of the school in the outside world. The term ‘external relations’ was not seen as distinct from ‘public relations’, however, and two Chairs were unfamiliar with the term.

### **6.3.5 Perception Patterns in the Case Study Schools - A Summary**

The graphs in Figure 6.5 compare the perceptions of marketing terminology of the staff sample interviewed in each school and their headteacher, ‘marketing manager’ and Chair of Governors. In this way, consistency or discrepancies in understanding between senior staff can be identified, and it may be considered whether there is any pattern to the understanding demonstrated by each school across the groups interviewed. For example, it is reasonable to hypothesise that there might be a connection between the understanding of senior staff and the understanding displayed by their colleagues - either because senior staff are effective in communicating their ideas to their staff, or because a collegial management style means that a shared understanding has been developed.

As with individual perceptions within groups, the perceptions both across senior staff and between senior staff and other colleagues is characterised by variability. Across the five graphs in the five schools, only in two cases (the understanding of ‘external relations’ at Hillview School, and the ‘overall view’ of marketing at Castle School) is there unanimity of understanding between the headteacher, the ‘marketing manager’ and the Chair of Governors. Equally, there are only two cases where there is complete diversity of view between the three senior managers. It might be reasonable to query whether there is a greater consistency of understanding between headteachers and ‘marketing managers’ than with the Chair of Governors, since the day-to-day working relationship will be more immediate and direct. The frequency of ‘shared perceptions’ across

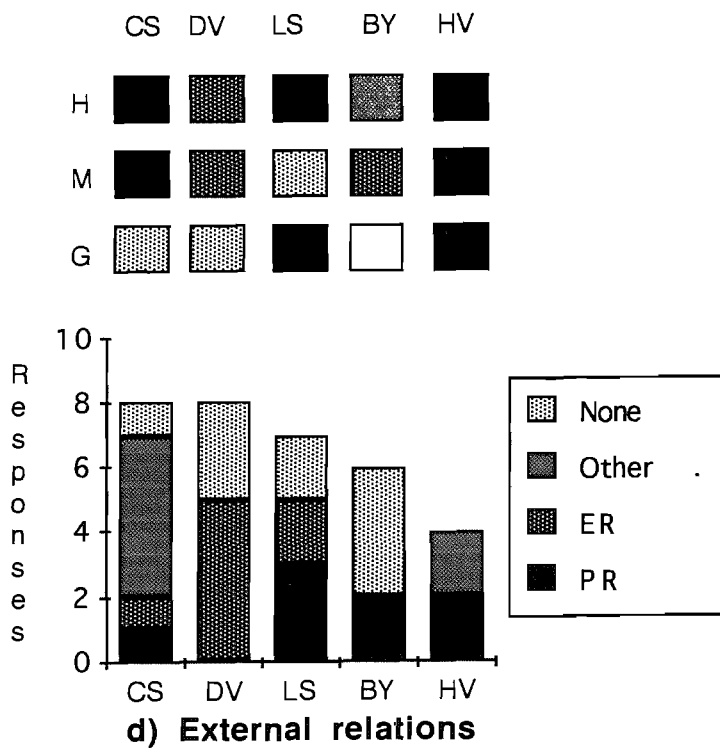
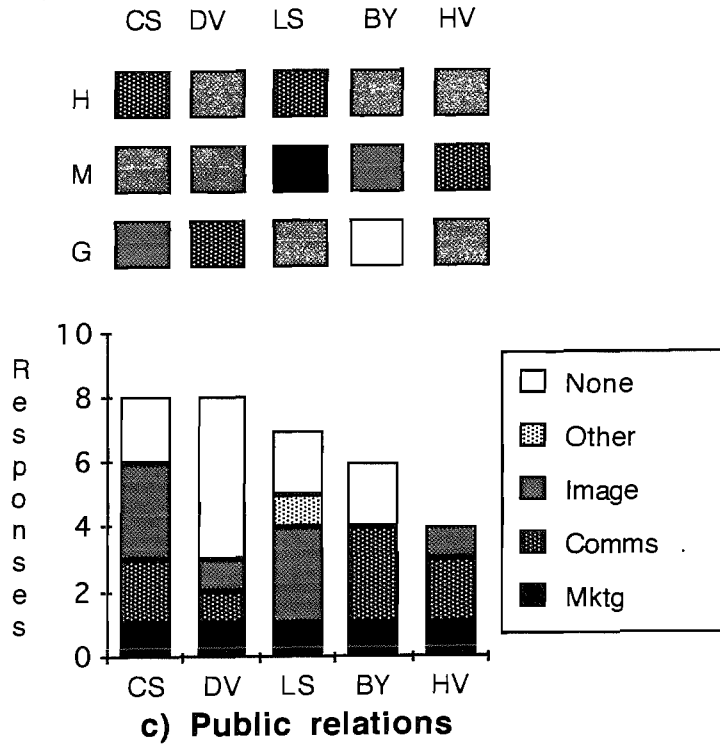


For Key see Figure 6.5 (3)

(Continued.....)

**Figure 6.5 Comparative perceptions of staff in the case study schools (1)**

(.....Continued)

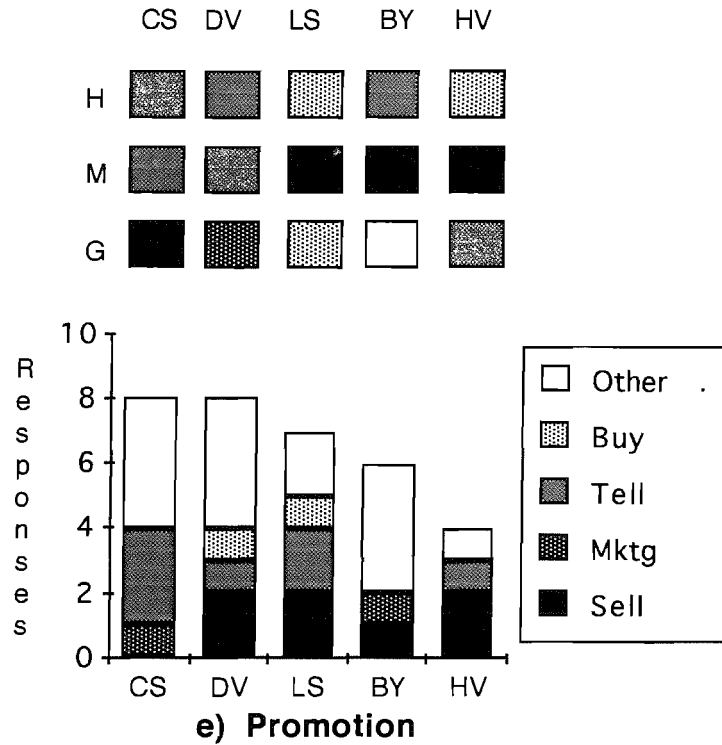


For Key see Figure 6.5 (3)

(Continued.....)

**Figure 6.5 Comparative perceptions of staff in the case study schools (2)**

(.....Continued)



**Figure 6.5 Comparative perceptions of staff in the case study schools (3)**

the five graphs in the five schools is shown in Figure 6.6. This suggests there is no consistency in the sharing of perception. In only a small proportion of combinations of senior managers is there any coincidence of perception (36.9%), with the same pattern of variability found across the five case study schools for which the data is available.

Figure 6.5 also appears to demonstrate the lack of a relationship between senior management perceptions and those of the whole staff. It has been identified earlier that the broad range of staff showed limited

understanding of the distinction between the key ideas in marketing. In this respect there appears to be a greater understanding of these ideas by senior staff (although this is not true in all cases), but there is no evidence of a sharing of those ideas within the case study schools.

Perceptions Shared By	Shared Perceptions		By Case Study School				
	Total	Maximum Possible	CS	DV	LS	BY	HV
Headteacher and 'Marketing Manager'	10	25	3	3	1	2	1
Headteacher and Chair of Governors	9	20	2	1	2	-	4
'Marketing Manager' and Chair of Governors	5	20	2	1	1	-	1
<b>Total</b>	<b>24</b>	<b>65</b>	<b>7</b>	<b>5</b>	<b>4</b>	<b>(2)</b>	<b>6</b>

#### **Key**

CS = Castle School

DV = Downsview School

LS = The Lee School

BY = Bycars School

HV = Hillview School

( ) = Total based on limited data availability

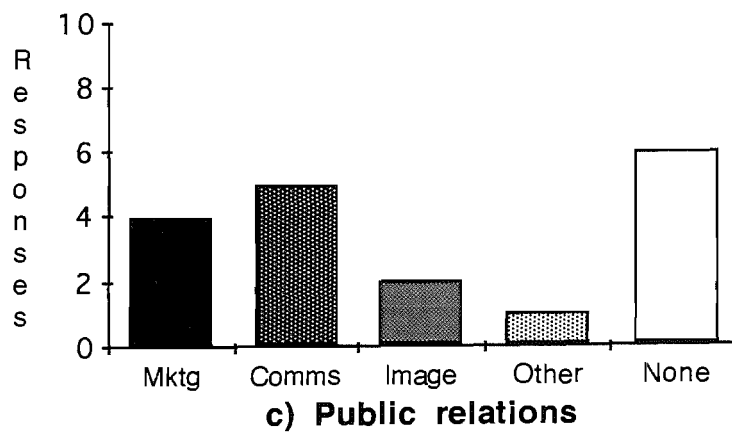
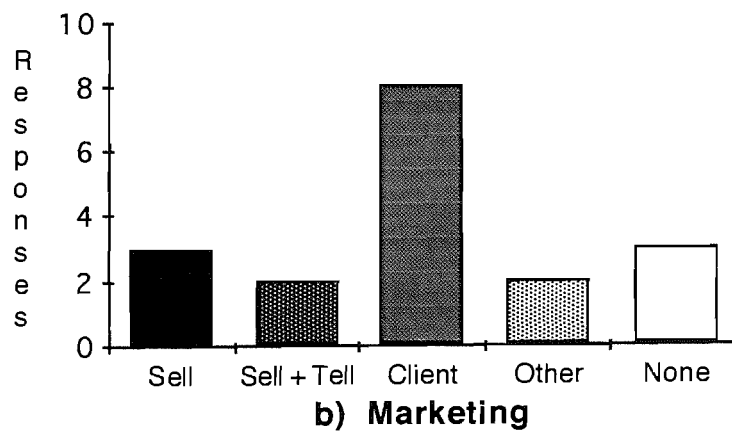
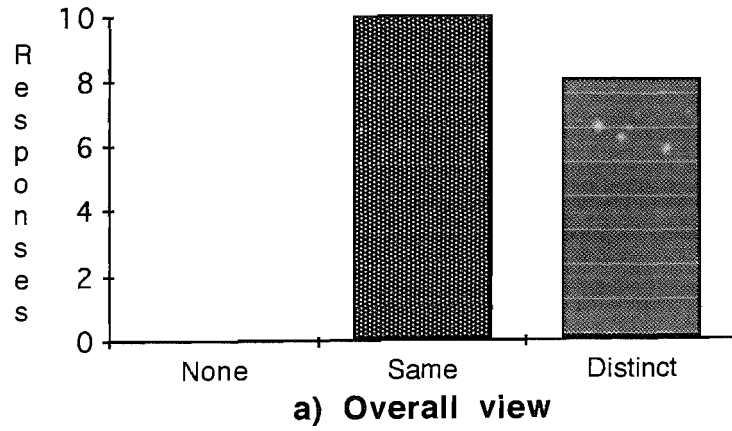
**Figure 6.6 Shared perceptions of marketing amongst senior staff in the case study schools**

### **6.4 Perceptions of Respondents to the Expert Survey**

The Expert Survey was conducted by questionnaire to 25 'experts', identified by an approach outlined in Section 5.8.4, of whom 18 responded. Figure 6.7 includes five graphs which display their responses in terms of perceptions of key terms in 'marketing'. The graphs demonstrate some variation in the range of responses from the 'experts' but a number of patterns might be seen to emerge from the data.

Firstly, Figure 6.7a suggests that all are familiar with the concepts of

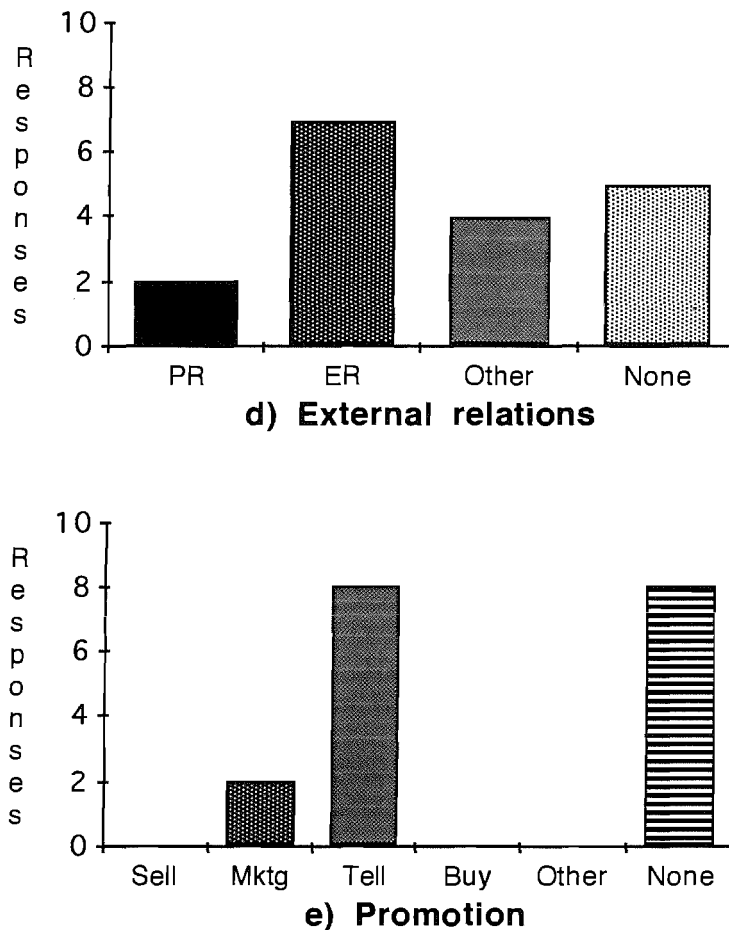




(Continued.....)

**Figure 6.7 Perceptions from the expert survey (1)**

(.....Continued)



**Figure 6.7 Perceptions from the expert survey (2)**

'marketing', 'public relations', 'external relations' and 'promotion'. However, just over half of the respondents (10) regard the terms as synonymous, while just under half (8) indicate some clear distinctions between the terms. The group indicating that there is no distinction in meaning between the key terms had responded to Question 2 in the questionnaire in one of two ways. Three provided a single statement to indicate that "all the terms mean the same", and then made no further response, while the categorisation of the remaining seven was derived by a consideration of their responses to each part of the question. The graph shows a dichotomous interpretation of the broad ideas within marketing, and may indicate that one group of the 'experts' has a "single focus view" of the nature of marketing ie that all aspects of marketing have a single purpose,

while the second group has a “multiple focus view” of the purpose of marketing ie that there are a number of aims that marketing activities seek to achieve.

Figure 6.7b shows the ‘experts’ views of the meaning of the term ‘marketing’ itself. Although there is some variation in response it is possible to identify a broadly dichotomous pattern here, too, in that eight respondents indicate a view of marketing as “meeting customer demands, needs and/or wants”, while five see marketing in terms of either ‘selling’ or a combination of ‘selling and public relations’.

Figures 6.7c and 6.7d represent the ‘experts’ interpretations of the concepts of ‘public relations’ and ‘external relations’. The diversity of interpretation is greater than with the term ‘marketing’. A small number of respondents regard the terms as synonymous, and this group together with those providing no answer (Categories D and E) represent the largest category. Those distinguishing public relations as ‘communicating with the outside world’ or ‘creating a good image of the school for the outside world’ were the same respondents as those who considered external relations as meaning ‘the whole range of the externally-focused activities of the school’. They also represent the eight respondents who, as shown in Figure 6.7a, indicated some distinction of terms between all the facets of marketing. This group might be identified as those having a well-developed understanding of the field of public relations, and an awareness of the distinction between public relations and external relations.

The understanding of the term ‘promotion’ by the ‘expert’ group is shown in Figure 6.7e. As with the understanding of ‘marketing’, ‘public relations’ and ‘external relations’, there is a marked dichotomy into two distinct groups. Those categorised as understanding the term as meaning “telling people about the activities and events of the school” were the same eight respondents indicating a distinction between the key terms in ‘marketing’. Those providing no answer or indicating promotion as meaning the same as marketing were those respondents suggesting no distinction between the key terms.

From the expert survey, therefore, it is possible to identify two differing perspectives on the concept of marketing. These represent the single-focus view, in which marketing is seen as an issue of “selling” the school and its educational provision to recruit additional pupils to the institution, and the multiple focus view, in which addressing client needs and attending to communication with the school’s constituencies as well as recruiting pupils are the components of marketing. These may be interpreted as representations of the different organisational orientations considered in Chapter 2. Those representing the single focus view are product-oriented organisations, in which the primary aim is to sell the ‘product’ of the organisation as it is. In the context of the school, the educational provision is selected by the school, which then sets out to persuade potential customers, be they parents or pupils, that it is the most attractive form of schooling. Those representing the multiple focus view are ‘market-oriented’ organisations, in which the aim is ....

“...to know and understand the customer so well that the product or service fits him and sells itself”

(Drucker (1973: 65)

By attending to communication and the management of the range of external interactions such schools are seeking to be responsive to their customers and potential customers. The link between a focus on meeting the needs of the community and an understanding of the nature of public relations and external relations is clear in the expert survey.

## **6.5 Attitudes to Marketing**

### **6.5.1 Introduction**

The acceptance and understanding of a conceptual innovation within the management of an organisation will depend on many personal, cultural, social, historical and political factors, the precise combination of which will be unique to the circumstances of the innovation (Bowe et al

(1992)). Amongst these factors the attitude of those involved to the innovation will be of some importance. Support and positive acceptance of ideas will facilitate their implementation, while mistrust of the motivation for innovation or dislike of a concept will hinder its progress. A negative view of an idea may in turn result in the negative aspects of an innovation being emphasised to undermine its potential for success. Innovative concepts which challenge personal or professional conscience are, therefore, particularly vulnerable to negative interpretation.

Two dimensions of the attitudes of participants in the education market place to the concept of marketing were considered in this study. Firstly, the perspective from the 'supply side' was examined. Interviews within the case study schools, with headteachers, "marketing managers", Chairs of Governors and a cross-section of staff investigated the personal view of each respondent to the development of marketing within education. Question 2 in the interviews with senior managers asked "What is your personal view of the place of marketing in education?", while Question 3 asked "How far is that view modified or constrained by practical realities?". In the interviews with a cross-section of staff Question A2 asked "How do you feel personally about the growth of marketing activity in schools ?" and Question A3 asked "How important do you feel marketing and external relations management are to the well-being of the school ?" .

This perspective was extended by examining the attitude of the 'experts' questioned in the modified Delphi Survey. Question 5 in the "expert survey" (Appendix 8 ) asked respondents "Why has the school developed the marketing practice and policy that now operate ?". Respondents were invited to select from a list of ten possible reasons, with an open option (ie "other reasons - please specify"), and then to rank their choices in order of importance.

Secondly, the 'demand side' of the market was considered through the attitudes of parents as revealed by the parental questionnaire. Question 9 in the parents' questionnaire used a scaled response (Cohen and Manion (1994): 280) to elicit views about the appropriateness of

marketing within education. Parents were asked to indicate their response to a number of statements about marketing on a four point scale - agree strongly; agree a little; disagree a little; disagree strongly (Appendix 7).

### **6.5.2 Attitudes and Influences on the 'Supply Side'**

The interview summaries in Appendices 10,11 and 12 indicate the responses from headteachers, 'marketing managers' and Chairs of Governors. The responses ranged from enthusiastic support for the concept of marketing to hesitation and suspicion. The deputy headteacher of Castle School in Alcheston, for example, responded with the view that...

"I am in favour of marketing - it is fundamentally important to schools. I am comfortable and positive about the idea, for it has always been there. It is essential and integral to curriculum management, for example with results, and to personal relationships, for example to the morale of staff. It has to be considered in all aspects of the work we do"

(Deputy headteacher, Castle School)

A grudgingly accepting view was expressed by the headteacher of The Lee School, who was not comfortable with the idea of marketing:-

"I am quite happy to tell people of the quality of the school, but I hate the massive expenditure on marketing that could be spent on education. Competition is bringing inflation in marketing costs. I would be much happier with collaboration between schools..... although my governors are not . (.....) However, we need to do it because other schools do"

(Headteacher, The Lee School)

Some respondents were openly hostile to the idea, however. The Head of Special Needs at Bycars School in Manport described his perception of marketing in education as...

“ Selling a product - the governments view of education is as crude as selling soap powder. I’m here to help with education - marketing is near to prostitution”

(Head of Special Needs, Bycars School)

From the range of responses it was possible to produce a five category classification of viewpoints :-

A- The respondent was happy with the concept of marketing in education with no expressed reservations

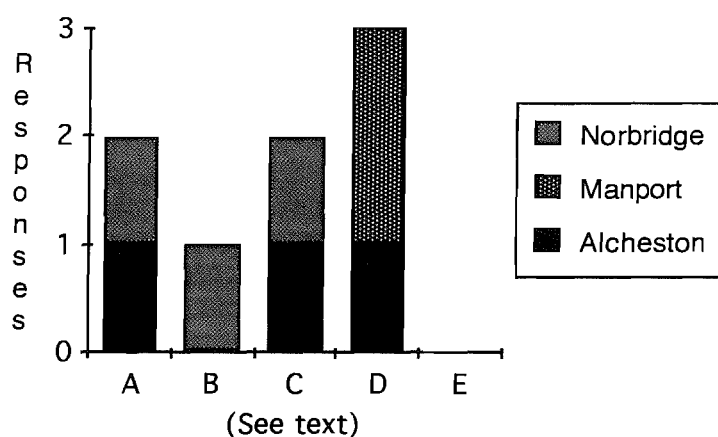
B- The respondent had reservations about the idea of marketing, but accepted its necessity

C- The respondent was unhappy with the idea and resisted the acceptance of the concept in education

D- The respondent was happy with telling people about the good aspects of the school, but disliked the competitive element of marketing between schools

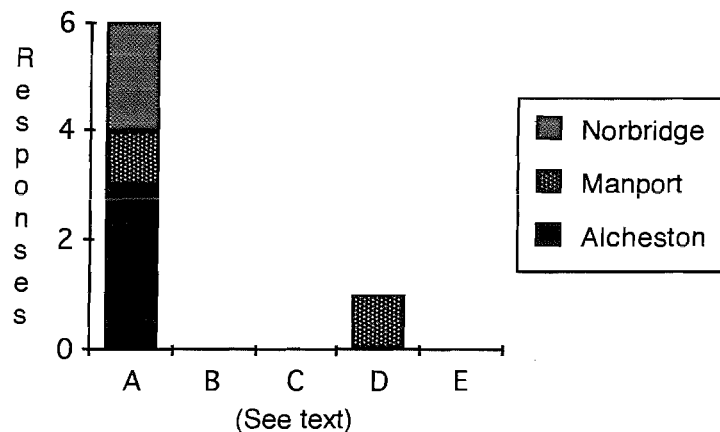
E- The respondent expressed no opinion on the issue

Figures 6.8, 6.9, 6.10 and 6.11 show the attitudes towards marketing of the headteachers, ‘marketing managers’, chairs of governors and the broad staff sample in the case study schools.



**Figure 6.8 The attitude to marketing of the case study school headteachers**

The graph of headteacher responses shows a full range of attitudes across the eight headteachers interviewed, and few clear patterns emerge. Only two accept the concept of marketing in education without reservation, with a further three happy with the idea of communicating positive aspects of the school to the local community but feeling unhappy about the competitive aspect of marketing. Three expressed a clear resistance to the idea of education marketing. In total six of the eight headteachers expressed some or significant reservations about the idea.



**Figure 6.9 The attitude to marketing of the case study school 'marketing managers'**

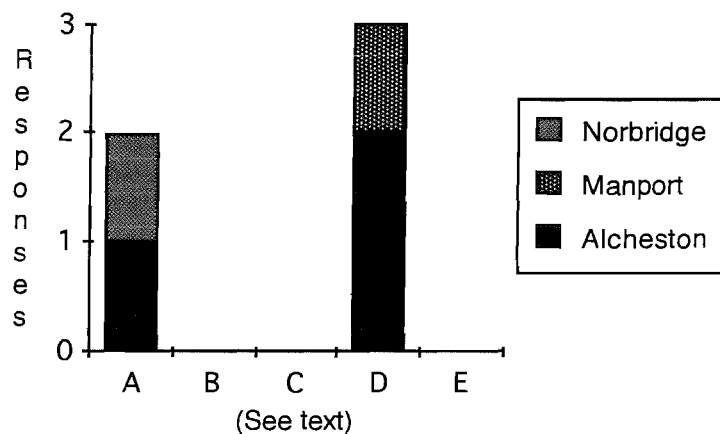
The response of the 'marketing managers' and the chairs of governors provide rather clearer patterns. The 'marketing managers' (Figure 6.9) show a strong support for the concept of marketing, which is to be expected. It is reasonable to assume that they were either allocated the role because of an interest in the field or their professional commitment pushes them to support one of their principal role tasks. The exception to this commitment was the 'marketing manager' at Bycars School in Manport. Her main responsibility was for community liaison, to which the marketing function had been added, and her support for the 'positive communications' element of the role but hesitation at the divisiveness of competitive marketing was expressed in her view that:-



“ Children are not products, so marketing is not an appropriate concept. It leads to competition which is divisive, and so leads to fundamental inequalities. It promotes individual choice and cuts out collective needs.(.....) (However,) we can't ignore open enrolment, and marketing can encourage greater responsiveness to the community and to parents and how we can communicate with them, so good can come from it”

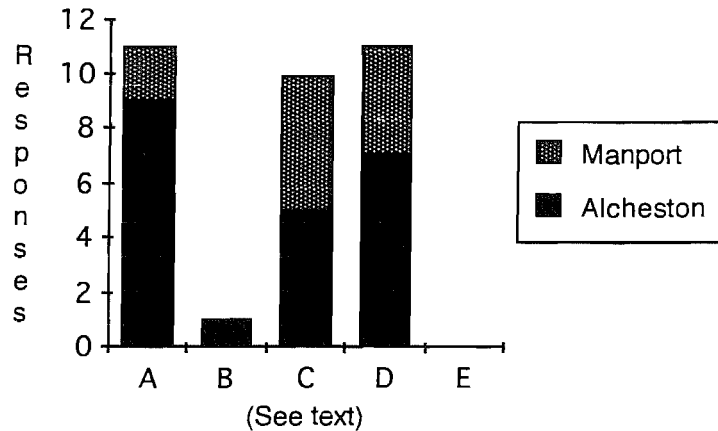
(Community Liaison Tutor, Bycars School)

The response of the chairs of governors (Figure 6.10) is generally positive to the concept of marketing, and this may reflect their background in the business community. However, three of the five showed concern for the negative consequences of competition upon schools.



**Figure 6.10 The attitude to marketing of the case study school chairs of governors**

Figure 6.11 shows the pattern of response from the staff sample interviews. As with the headteachers there is a full range of attitude, yet a substantial majority of the staff interviewed (22 out of 33) expressed either unreserved support for the concept, or an acceptance of it but concern for its negative consequences. One third of the interviewees expressed clear opposition to the idea of marketing in schools.



**Figure 6.11 The attitude to marketing of the case study school staff sample**

A second dimension of professional views of marketing was investigated through a question which invited respondents to reflect upon the importance of marketing to their school and its future. The responses were grouped into four categories:-

- A- Marketing is important to the future of the school
- B- Marketing is unimportant to the future of the school
- C- Marketing is neither important nor unimportant to the future of the school
- D- No answer was provided or no opinion expressed

The individual responses from the staff sample interviews are presented within Appendix 13. A large majority of staff (27 out of 33) regarded marketing as important to the future of their school, and most expressed this view with some vigour. The Bursar at The Lee School suggested that...

“Marketing is essential - we won’t survive without it”  
(Bursar, The Lee School)

while a head of department at Hillview School expressed the view that...

“It has now become an important feature of our daily life and I

recognise its importance to the school in terms of the popularity of the school for the future”

(Head of Business Studies, Hillview School)

Only one interviewee suggested that marketing was unimportant to the future of the school, indicating that...

“The school appears to be surviving well without marketing and we are an over-subscribed school. There should be collaboration not competition between schools”

(Head of I.T., Castle School)

Amongst the headteachers, ‘marketing managers’ and Chairs of Governors a similar pattern of response was identified. The headteacher of one school indicated that...

“It is a long term survival issue - we need to recruit pupils”

(Headteacher, The Abbey School)

while the Chair of Governors at one of the Alcheston schools suggested that...

“Marketing is very important, and is as important as the LEA will allow”

(Chair of Governors, Castle School)

making reference to the LEAs attempts to persuade schools to be collaborative and not actively recruit out of catchment. An important perception from some of the headteachers and ‘marketing managers’ interviewed was that the importance of marketing was greater than recognised by their colleagues. The deputy headteachers at two Alcheston schools expressed their concerns:-

“Do people appreciate the connection between marketing and the future of the school ? There is a real need for better internal

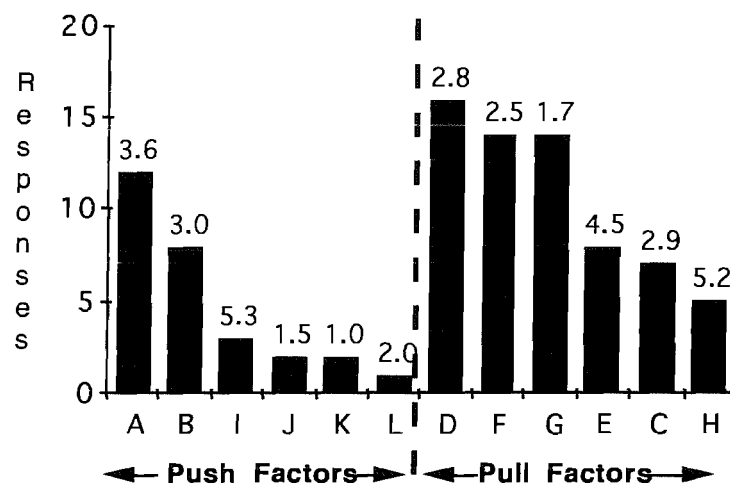
communications (on this matter)”

(Deputy headteacher, Castle School)

“Staff haven’t appreciated the ramifications and the need for marketing - there is some complacency”

(Deputy headteacher, Downsview School)

This recognition of a need for marketing was explored further in the expert survey. Figure 6.12 shows the responses in the expert survey questionnaire returns to the question which asked why their school had



### Key

- A Legal obligations
- B Other schools are marketing themselves aggressively
- C SMT personality emphasises importance of public image
- D The school has always publicised its strengths
- E SMT perceive marketing as key element of management
- F Marketing is an attempt to identify & satisfy parent and pupil needs
- G Marketing is about the pursuit of quality
- H Marketing is an enjoyable activity
- I Parental choice makes it necessary
- J Need to recruit pupils because of falling rolls
- K Need to reverse a negative image of the school
- L Need to build parent confidence and pupil pride

2 .8 = Mean ranking for each factor

**Figure 6.12 Persuasive factors in adopting marketing practice and policy - a summary of factors from the expert survey**

developed the marketing practice and policy that it operates. The nine specified reasons within the questionnaire can be grouped into reasons which may be termed 'push factors' and reasons which may be termed 'pull factors'. The push factors are those which persuade the school to adopt a marketing perspective for reasons which lie outside the school, for example, the existence of legal obligations to provide information to parents, or to correct negative aspects of the school's operation. Pull factors are those which are self-generated from within the institution, which are positive and which represent a desire to pursue a marketing approach, for example the desire to identify and satisfy the needs of parents and pupils. For the sake of simplicity of interpretation Figure 6.12 groups the push and pull factors together rather than presenting the factors in the same order they appeared within the questionnaire. The final category in the questionnaire invited respondents to indicate other factors which had been important to them, and three factors were identified from the questionnaires. These were:-

- The need to recruit pupils because of falling rolls (Factor J)
- The need to reverse a negative image of the school (Factor K)
- The need to build parental confidence and student pride(Factor L)

Each of these may be regarded as a 'push' factor, and hence they are included in the graph in the 'push' group.

Figure 6.12 suggests that, overall, 'pull factors' were identified more frequently than 'push factors' in the development of marketing practice and policy. The imbalance in the original questionnaire between the two groups of factors (six 'push' and three 'pull' factors) is an element in this analysis, although the factors for inclusion were those which had been identified in the preliminary interviews in Phase 1. However, if we examine only the first three 'pull' factors, in terms of frequency of score in the graph, and the first three 'push' factors, then each of the pull factors scored a higher response. Furthermore, although the only 'other' factors mentioned by the respondents were 'push' factors, they were not identified sufficiently frequently to alter the overall balance between the two groups.

The most frequently cited reasons for adopting a particular approach to marketing were:-

- Factor D - the school has always publicised its successes and strengths
- Factor F - marketing is an attempt to identify and satisfy the needs of parents and pupils
- Factor G - marketing is intimately linked to the pursuit of quality in all facets of the school's work, and requires all staff to focus on quality in what they do

In addition to indicating which factors had played a part in the development of their approach, the survey asked respondents to rank the factors in terms of their relative importance, with 1= most important . The value above each column in Figure 6.12 shows the mean ranking recorded for that factor. A number of observations may be made from the data. Firstly, the factors with the lowest mean scores are those identified as 'other factors' by the respondents. We might expect such 'other factors' to receive a 'very important' ranking because their separate identification by respondents would be a measure of their importance. In each case only one or two 'experts' identified the factor, so the low value is of no significance within the overall pattern, and represents its infrequency of identification but importance of ranking. Secondly, if the three most frequently mentioned 'push' factors and 'pull factors' are considered, not only do the 'pull factors score a greater frequency of recording, but they also have lower average rankings. Hence the three 'pull' factors mentioned above as of most importance also scored the lowest average rankings. In this way their significance as influencing factors is underlined.

### **6.5.3 Attitudes on the 'Demand Side'**

The study also addressed the views of parents about the place of marketing in schools. This was considered to be an important element of the study for the attitude of parents to the development of a marketing philosophy by schools will be influential in indicating what marketing

practices, and what intensity of operation, to apply. Specifically, we need to identify whether parents have been captured by the discourse of choice and the market. Figure 6.13 shows the results of Question 9 in the Parents' Questionnaire. The ten statements that each respondent was asked to indicate their agreement or disagreement with were phrased to include a mix of negative and positive views on marketing. Statements 1, 2, 6, 8 and 10 were phrased to imply a negative image of the idea of marketing, while the other statements were phrased to support the concept. Figure 6.13 has been drawn to enable the negative and positive views to appear on the same side of the table to facilitate interpretation.

The data suggests that there is a range of views about the place of marketing in schools. From the whole sample, 57.9% supported a little or strongly a positive view of marketing, while 42.1% expressed negative views of marketing a little or strongly. An observation in relation to the completion of the question was that there was an unwillingness of respondents to use the "disagree strongly" category, either for positive or negative statements. Only 12% of scores fell into this category, compared to 29.8% who ticked the "agree strongly" box.

The broad pattern of a slight majority of parents supporting the concept of marketing by schools contains a number of identifiable sub-patterns. Firstly, parents support strongly their right to choose schools. The statement attracting the strongest support was the assertion that "parents have a right to choose their child's school, and marketing by schools gives them useful information to make their choices", with 90.2% of parents agreeing strongly (62.6%) or a little (27.6%). Secondly, parents believe that schools need to be very responsive to parental wishes, and 75.2% agreed a little or strongly with the statement that "competitive marketing between schools sharpens up their concern for how they operate and for meeting parental wishes". Thirdly, however, parents are aware of the tension between expenditure incurred in competitive marketing situations and expenditure on educational needs. The strongest support for one of the negative statements was for the assertion that "schools should spend their money on their pupils, not on marketing activities", which 78.8% of parents

Positive Statements	Agree Strongly	Agree a Little	Disagree a Little	Disagree Strongly
3	77	34	9	3
4	59	41	15	5
5	22	44	39	18
7	53	40	22	7
9	21	61	26	11
Negative Statements	Disagree Strongly	Disagree a Little	Agree a Little	Agree Strongly
1	37	30	40	14
2	33	39	34	13
6	5	19	52	45
8	9	25	51	36
10	17	33	49	20
<b>Totals</b>	<b>333</b>	<b>366</b>	<b>337</b>	<b>172</b>
<b>Percentage</b>	<b>27.6</b>	<b>30.3</b>	<b>27.9</b>	<b>14.2</b>
	Positive Views		Negative Views	
<b>Total percentages</b>	<b>57.9</b>		<b>42.1</b>	

**Figure 6.13 Parental views of the value of a marketing approach by schools (Number of responses)**



agreed with a little or strongly. Similarly, 70.7% of parents agreed a little or strongly with the view that “a little publicity is a good thing for a school but strong marketing is inappropriate”. Fourthly, the general support for the idea of marketing is hesitant rather than enthusiastic. The support for the statements modifying a strong approach to marketing emphasises this view, and the responses to statements 9 and 10 demonstrate this clearly. While 66.6% of parents supported the view that “marketing is a part of all businesses and services and is just as appropriate in schools”, 56.1% agreed that “marketing by schools is not a good thing, but is essential in the current climate”.

Overall, therefore, it would appear that parental allegiance to the market is conditional, and reflects a concern to modify what they perceive as the negative dimensions of competition and marketing. Schools need to be aware of this conditionality in considering their response to marketisation pressures.

Sections 6.3 to 6.5 have considered the range of understanding and attitudes to marketing of the stakeholders surveyed or interviewed during the study. Section 6.6 seeks to draw together these findings to address the sub-questions linked to KQ1.

## **6.6 Perceptions and Attitudes - an Analysis**

### **6.6.1 The Perception of Marketing (SQ 1.1)**

The concept of marketing is one which has traditionally been subject to a range of interpretations at operational level by individuals and organisations (Chapter 2). The model of terminology in the field developed in Chapter 2 might suggest that individuals with functional responsibilities in organisations might define marketing specifically in relation to that function - for example, the sales / promotion employee may see marketing as the equivalent of selling, and the customer, whose overt contact with the producers is at point of sale, may have the same perception. The marketing

manager with an involvement in the strategic planning both of marketing and of the organisation as a whole, may have a broader view, however, with a focus on client needs and wants. A variability of definition may exist within the organisation, but this might be explained in relation to the individual's operational 'field of vision' and may fit into a broader concept of the nature of marketing.

The evidence outlined in this chapter demonstrates clearly a wide range of perceptions of the nature of marketing within secondary schools. Additionally, it suggests little consistency of view in relation either to position within the school organisation or responsibility with respect to marketing. It will be helpful to reflect on this in terms of the perceptions of 'senior managers' (headteachers, chairs of Governors and 'marketing managers'), comparing the case study schools with the views from the expert survey, and then to consider the issues emerging from the staff sample interviews.

The 'expert survey' suggests that there is a dichotomous interpretation of the concept amongst experienced practitioners - the product / selling focused group and the client-focused group. Both show consideration of the range of functions and terms within marketing, and show their understanding of its overall complexity, yet consistently interpret the components of marketing in relation to their chosen focus. At the level of 'expert' practice, therefore, there is variation in understanding and interpretation.

Within the case study schools a more variable pattern emerges amongst senior colleagues. The case study schools were selected to represent, insofar as any school may be representative in the light of the complexity of factors influencing its culture and personality, a typical set of schools within the secondary sector. It might be assumed, therefore, that their analysis and philosophy in relation to markets and marketing would be less developed and more variable than the 'expert survey' respondents. This contrast was clearly evidenced. While the headteachers of the case study schools showed an awareness of distinctions between the ideas of

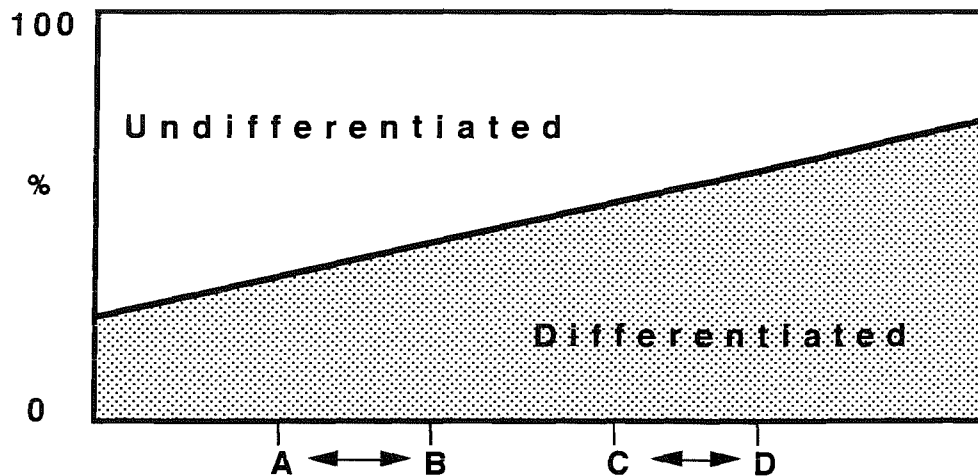
'marketing', 'public relations', 'external relations' and 'promotion', there was no consistent pattern of understanding. Similarly, the 'marketing managers' showed no consistent pattern to their understanding across the sample. Only amongst the chairs of governors did a consistent view emerge, which saw marketing in terms of "selling" places on the school roll, combined with public relations activities to communicate the school's successes and ideals. Across the senior staff within the case study schools there was also a clear absence of consistency of understanding, with very few examples of headteacher, marketing manager and Chair sharing a perception in relation to a key concept.

At the level of the whole staff in the case study schools there emerged both a more diverse range of understanding than amongst senior staff, and less understanding in relation to the idea of 'public relations', 'external relations' and 'promotion'. Furthermore, there appears no obvious relationship between the views of senior staff and the views of their colleagues across the staff. This issue will be considered further in Chapter 7 in an examination of organisational structures developed for marketing, but provides evidence of limited planning and staff development with respect to marketing.

### **6.6.2 Modelling the Marketing Concept for Schools (SQ 1.2)**

It is clear that the concept of marketing is variably understood within the case study schools, each individual ascribing their own interpretation to the key terminology in the field. In both horizontal and vertical organisational relationships there is little evidence of a sharing of concept or of a communication of a chosen perception of the idea from senior staff to colleagues. Within the schools covered by the expert survey there is no single understanding of the ideas, but two contrasting interpretations are found, one related to 'product-focus' and selling, and a second underpinned by the idea of a client-driven system.

It is asserted here, therefore, that we can develop a model to demonstrate the variation in the understanding of the marketing concept in



**Figure 6.14 An interpretation spectrum of the concept of marketing in schools**

schools, and this is represented in Figure 6.14. This conceives understanding as representable as a spectrum of perceptions, which might relate either to the views of individuals within an institution or to institutions within a group or selection of schools. Two components exist within the model - a differentiated view, in which the aims of marketing have been clarified at a personal level by individuals or institutions, whether in product-centred terms or in client-focused terms, and an undifferentiated view in which no clear aim has been identified. The polarities of the spectrum represent positions in which the majority of individuals or schools hold one specific perspective, but suggest that there will always be a mix of perceptions. Within the model in Figure 6.14 it might be considered that the case study schools lie within the zone labelled A-B, while the 'expert schools' lie in the zone C-D.

It is not clear from this study how the balance between the two perspectives changes with time, but one might hypothesise, extrapolating from the ideas of Drucker and Kotler (see Chapter 2), that there is movement along the spectrum. We might term this movement 'spectral drift'. This emphasises a process of change over time as individuals and institutions reflect upon the nature of marketing. At the micro scale of a

single institution or individual changes in position may be 'stepwise' rather than continuous, but Figure 6.14 may be seen as a valid macro scale summary. The concept of 'spectral drift' may have wider application, too, for in many issues of understanding and conceptualisation the different perspectives represent a spectrum rather than simple alternatives.

The position of an individual or school on the spectrum and the rate of spectral drift will be influenced by a wide range of factors. Within the case study schools identifiable initial control variables included personal background (professional and career experience) and perspective and, to a much lesser extent, responsibility and involvement with the planning or operational implementation of the marketing process. Key factors in the pattern of 'spectral drift' might include both internal and external 'drivers'. Internally, the allocation of time to reflection, discussion, reading and evaluation, and the sharing of ideas between colleagues would seem to be of importance. Externally, the nature of the competitive environment, both in terms of the changing size of the market (for example because of falling or rising rolls) and in terms of the activities of competitor institutions and the relationships with them, will be important. It is suggested here that an important factor in influencing the perception of marketing is the pressure to recruit pupils. Where the character of the market does not threaten significant downward trends in pupil recruitment, schools have time to consider the concept of marketing and to generate a client-focused view. Where substantial change in recruitment is threatened, the key priority is pupil numbers in the short-term. The development of a client-focused perspective may divert resources (principally time) from the short-term survival needs, and so a product-focused 'selling' perspective might be found.

This development might be illustrated from the case study schools. Within Alcheston the market for each school has been relatively stable since 1988, and while each of the schools believes its 'neighbours' to be competitors, none fear rapid decline in recruitment. For some, particularly Castle School, recruitment is more a question of selection. At the initial interview stage of the research, the headteachers of Castle School

and The Lee School demonstrated an understanding of marketing that might be seen as 'undifferentiated', while the headteacher of Downsvie School had a perspective that might be regarded as 'client-focused'. By the time of the third interviews, some eighteen months later, the head of Castle School had moved to a client-focused view, indicating that...

"(Marketing) underpins everything that we do - its now implicit - but thats what marketing is"

(Headteacher, Castle School)

The new headteacher at The Lee School was still unclear about the nature of the local market, and might be seen to have an undifferentiated view, but with a leaning towards a 'selling' perspective. In response to the question "What do you understand by marketing?" he indicated....

"I don't know - I'm not sure what the end-product should be. Is marketing just getting more youngsters in, or is it about a balance between numbers and quality ? We've got stiff competition from the Alchiston schools.....(so)... the gentleman's agreement about press coverage and comments on results is out-of-date. I believe if you've got it you should flaunt it"

(Headteacher, The Lee School)

At the time of the final interview the headteacher of Downsvie School retained a client-focused view. It is suggested that in Alchiston the 'spectral drift' is taking headteachers at least towards a client-focused view rather than into a competitive 'selling' perspective.

In contrast, the headteacher of Hillview School in Manport typifies the initial development of a 'selling' perspective in response to a situation of decline and competition. Shortly after his appointment to the school in 1990 the Head produced a paper for the staff and governors on "The Way Ahead at Hillview School - the Challenge of LMS" . This predicted up to six redundancies from the staff without enhanced pupil recruitment because of falling rolls, and put in place a development strategy which included...

“.. a vigorous and extensive recruitment campaign.....which includes a comprehensive publicity and marketing campaign”  
(Headteacher, Hillview School (1990))

That this was a short-term necessity but only part of a long-term plan was emphasised, however, in the pressure to enhance quality of provision within the school and to respond to the local community. The same document identifies that...

“(We must make) sure we are an attractive option for parents. (...) We have already started to develop a programme to raise our standards and improve the quality of education we offer. This is crucial to us. We need to be able to deliver improvements in tangible terms by the exam results we gain and other measurable ways eg pupils’ uniform, general behaviour, attendance and punctuality, and must be seen by parents to do this. (...) (and to be) responding to the needs of the community around us. The neighbourhood grapevine can be our greatest ally as well as our fiercest critic”

(Headteacher, Hillview School (1990))

Herein is "spectral drift", to a 'selling' perspective and on into a client-focused perspective.

A second model emerges from the analysis in this chapter, which seeks to describe the concept of marketing in relation to schools, and this is visualised in Figures 6.15 and 6.16. At the centre of Figure 6.15 are the communication activities that relate to marketing as a process. Here there are four internal and inter-related concepts - public relations, external relations, internal communications and promotion. These represent importantly different elements of the marketing process, reaching to and from client groups.

Surrounding the communication activities in the model are three

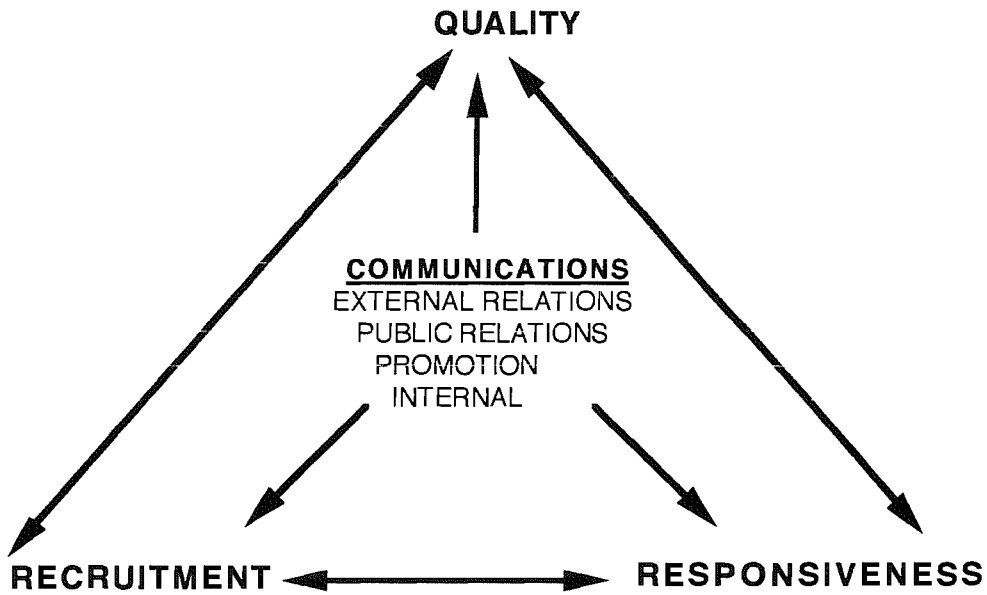


Figure 6.15 A model of the concept of marketing in schools

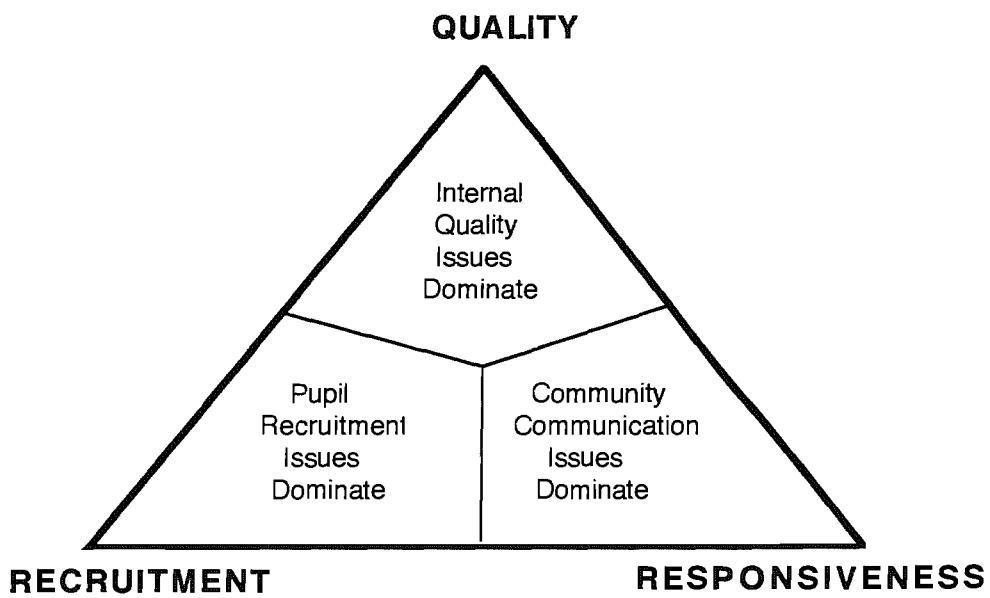


Figure 6.16 Marketing aims and the field of marketing activity in schools - a model



elements that describe the goals of marketing in the short-term and medium term - quality, in terms of educational provision for children and the efficiency and effectiveness of the school; responsiveness to the school's stakeholders' views and needs; and the recruitment aims of the school, which are necessary to ensure financial and educational viability. This model, therefore, brings 'marketing as recruitment' together with three other key areas of current managerial focus - the pressure towards a client-focused view, as characterised by the Parents Charter (DfE (1993)); the focus on communications skills as emphasised in much of the literature on marketing and public relations in schools (e.g. Devlin and Knight (1991); Marland and Rogers (1991)); and the concern for quality through schemes such as "Investors in People" and the pursuit of British Standard recognition (formerly BS5750, now ISO 9001) (West-Burnham (1992); Murgatroyd and Morgan (1993); West-Burnham (1994)).

The balance between the processes at the centre of the model will reflect the contemporary priority objectives amongst the three key aims for a school. These will lie in a 'field' of objectives between the three key aims - ensuring the long-term survival of the school and the satisfaction of the professional and personal tenets of those working in the institution. This objectives 'field' is visualised in Figure 6.16, which illustrates how different areas of this 'field' give priority to different objectives. We might expect that a school under threat from declining pupil numbers will focus its communication activities in the bottom left of the model. Schools in a more secure market position will be located more centrally or towards the other apices, depending on local and personal priorities. Two ideas are emphasised, though. Firstly, it is clear that marketing aims will always have a component of each of the three apical elements of the model within them. Marketing can never only be about recruitment. Secondly, marketing has two components (quality and responsiveness) which fit, as broad concepts, more comfortably within the philosophical perview of most educationists. The model may represent, therefore, an interpretation of marketing which is of and for the educational community rather than imported from outside.

## 6.7 Summary

This chapter has considered the marketing perspective of secondary schools and has examined the understanding of the key ideas within marketing that staff within the schools and which parents, as their principal customers, have. Specifically it has addressed the question of how the concept of marketing is received and understood in schools. The principal interpretations are that:-

- There is a wide range of understanding of the concepts of marketing both amongst individual staff and amongst decision-making staff (headteachers, 'marketing managers' and chairs of governors).
- There is a 'spectrum' of perceptions of marketing within the schools in the study, ranging from an undifferentiated view of marketing to a differentiated view, with two possible perspectives – a 'selling' perspective and a 'client-focused' perspective (Figure 6.14).
- Individuals and schools might experience 'spectral drift' within this model, with an indication that this will normally be from an undifferentiated to a differentiated position. A school's or an individual's position on the spectrum is influenced by a range of internal and external factors, including the career and professional experience of staff and the nature of the competitive environment within which the school is operating.
- A model of the nature of marketing in secondary education can be generated, and is illustrated in Figure 6.15 and 6.16. This brings together the concepts of communication (including public relations, external relations, promotion and internal communications), recruitment, client responsiveness and quality assurance .
- 'Marketing managers' and chairs of governors showed strong support for the concept of marketing, while two thirds of the staff sample expressed either unreserved support for the concept or an acceptance of it balanced by concern for its negative consequences.

- Most staff, at all levels of seniority, regard marketing as important to the future of their school.
  
- Factors influencing the adoption of a marketing perspective can be categorised as 'push' factors and 'pull' factors. Overall, 'pull' factors (the perceived benefits of marketing) are more important influences than 'push factors'.
  
- The most important 'pull' factors were identified as:-
  - the desire to publicise the school's strengths and weaknesses
  - the desire to identify and satisfy the needs of parents and pupils
  - the pursuit of quality in all facets of the school's work
  
- A small majority of parents support the concept of marketing in schools, with strong support for the 'right to choose' and the need for schools to be responsive to parental wishes. However, this support is conditional, in that there is a clear desire to avoid the potentially negative nature of some of the consequences of marketisation.



**CHAPTER  
7**

**Results / Analysis 2 - Organisational Responses to  
Marketisation**

## Chapter 7

### Results / Analysis 2 - Organisational Responses to Marketisation

#### 7.1 Introduction

Chapter 7 examines the second key question within the study, which considers the operational and organisational responses to the development of marketing within secondary schools:-

**(KQ 2) What have decision-makers in schools, whether they be headteachers, governors or classroom teachers, done to modify the organisation of the school's management in response to pressures towards marketisation ?**

The sub-questions are:-

- **(SQ 2.1) What organisational structures have developed to 'manage' external relations and marketing ?**
- **(SQ 2.2) What strategic planning (both rational and non-rational) is being employed in these areas ?**
- **(SQ 2.3) What strategies, tactics and methods are being employed in the the field of marketing ?**
- **(SQ 2.4) Do those working in schools have an adequate understanding of their needs in this area ?** This considers whether there is sufficient practical expertise in schools to engage with a marketing culture at the operational level, and whether there are specific training needs that can be identified.
- **(SQ 2.5) What evaluation methods, if any, are being deployed by schools ?**

The sub-questions consider key elements in strategic planning or school development planning, as outlined, for example, by Everard and Morris (1990), Hargreaves et al (1990), and West-Burnham (1994). The planning process is examined at the macro scale ie what overall form and shape does the process take, and also at the micro-scale by looking at the issues of setting objectives, choosing appropriate implementational methods, evaluating process and outcomes, and considering the human resource issues of skills, knowledge and training needs.

## **7.2 The Evidence Base**

Every element of the data collection process considered these management issues at least in part and Figures 5.3, 5.4, 5.5, 5.6 and 5.8 show the evidence base for each of the sub-questions relating to this theme. It is clear that the range and quantity of evidence is substantial. In many cases, however, the same or very similar evidence was pursued from a variety of sources as a triangulation mechanism (see Section 5.3.6) for checking the accuracy or interpretation that one interviewee / respondent had provided. In this way, for example, the headteacher's view of staff development with respect to marketing was checked by considering the views of both senior colleagues and the staff sample. In some cases this enabled omissions to be rectified, where the head, in interview may have forgotten to describe certain elements of the marketing programme. In others, it enabled the relative importance or success of particular approaches to be judged.

The results and analysis which follow seek not to present all data where it simply repeats or confirms the judgments made from one of the sources. However, discrepancies or alternative viewpoints will be highlighted. In relation to each of the key questions, therefore, the results will be considered in one of the following two ways - either a comparison of the case study schools with the expert survey results, where there is a relatively simple pattern emerging, or a comparison of the data from sub-groups within the case studies (eg senior staff v staff sample v parents), and from the expert survey , where important differences emerge.

## 7.3 Marketing and School Organisation

### 7.3.1 New Structures for Old ?

With the introduction of a new management function (marketing) we might expect adapted or new organisational structures to emerge. However, the case study data suggests that, instead, there is an emphasis on “ad hoc arrangements” and minor readjustments to existing systems made in a reactive way.....

“It is still seen as a “bolt-on”, not as an integral part of the role of management”

(Deputy headteacher, TheLee School)

This may reflect the limited time allocated to marketing, for all the senior managers interviewed agreed that it occupies only a small percentage of the managerial time, distributed throughout the year in peaks and troughs that relate to specific events or activities. As one headteacher indicated.....

“ Its time consuming, but it takes little time compared to the curriculum and pastoral work”

(Headteacher, Lee School)

However, two dimensions of this relative insignificance may be identified. Firstly, there is wide recognition that the time applied to marketing has been increasing within the last five years. In Norbridgeshire, each of the headteachers commented on the increasing time demands of marketing, while in Alcheston two of the heads referred to their increasing commitment. This increase in time commitment emerged quite strongly in the contrasting responses of the Castle School headteacher in the first and final interviews. In the first interview, he suggested that “(marketing) occupies only a few percent of our time and, currently, we have to make a conscious effort to consider it”, while in the third interview he indicated that “marketing was alien to begin with, but it is now quite different and it underpins everything that we do” (Headteacher, Castle School).

The second dimension is a perception that marketing ought to be more important within the management of the school than it is. In the initial interview the headteacher of Castle School expressed a view that

“Marketing should have a central management function, but its not yet there. Its directly linked with school survival, it costs jobs if its not done effectively”

(Headteacher, Castle School)

This view was extended beyond the survivalist stance into a concern for quality by another headteacher.....

“There is a relationship between external relations and other areas.(....) Its to do with self-esteem, ethos and character in the school, which feeds into the curriculum and the classroom. It creates a buzz that feeds into other things”

(Headteacher, Downsview School)

Within the case study schools, the lack of significant organisational change and the relative lack of time application to marketing, was emphasised by each of the other groups interviewed. Of the five chairs of governors interviewed, for example, four considered that the governing body had paid little attention to marketing, describing it as “still comparatively peripheral” (Chair, The Lee School), “a low priority issue” (Chair, Downsview School), and “of little consideration in the past, but it will be more important in the future” (Chair, Castle School)

### **7.3.2 Organisational Structures for Marketing**

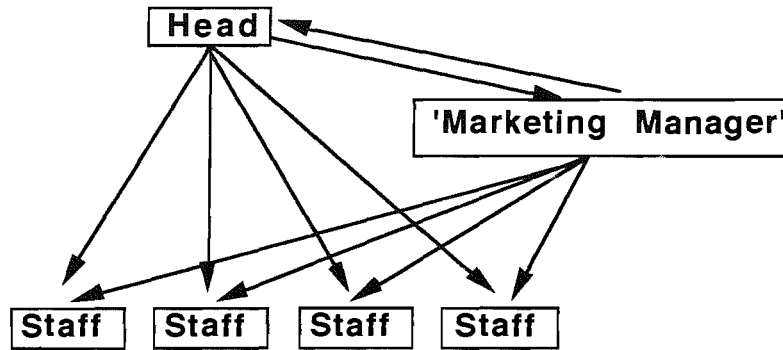
The term “organisational structure” refers to the roles of individuals, groups and teams within an organisation, and the nature of the functional relationships between them. Chapter 3 has considered some of the typologies of structure identified in the existing academic discourse. The selection of a structure within an organisation is a response to a complex



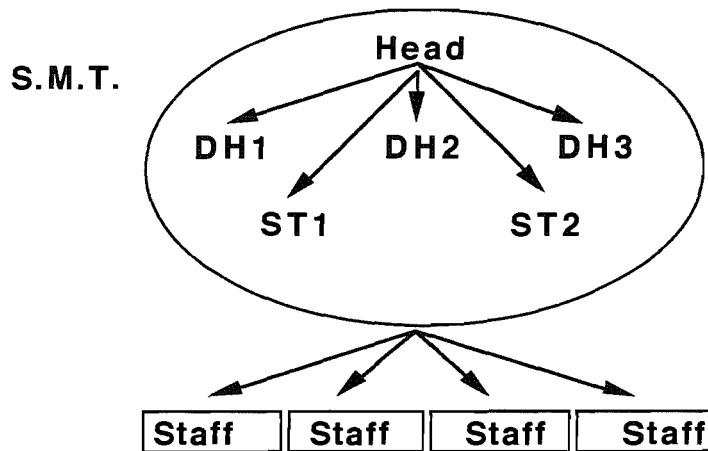
of factors, including a consideration of the range of functions to be performed, the resources available, staff interests, abilities and personalities, and the managerial perspectives of decision-makers within the school. In fact, structures may evolve rather than be “selected” and may be regarded as constantly adjusting to a range of dynamic needs.

Within the case study schools, there is a diversity of organisational structure, and no two schools display an identical pattern. However, it is possible to develop a typology which enables some generalisation on these structures to be realised, which is outlined below, and is shown diagrammatically in Figure 7.1.

- **Type 1- the Chief Executive Model.** In this structure the headteacher lies at the focus of a centrally-coordinated model. The head takes decisions, provides the drive and the ideas and defines the modus operandi of the marketing of the school. Implementation of policy is undertaken by nominated individuals, who may be consulted in the formulation of policy. However, the headteacher decides policy and dictates, ultimately and in a direct “hands-on” approach, the specific tasks to be undertaken and the manner of their operation. A member of staff may be nominated as “Marketing Manager”, or similar designation, but will normally be of lower than deputy head status and will report directly to the headteacher.
  
- **Type 2 - the SMT Model.** This structure involves the Senior Management Team as the focus of decision-making on marketing, and the headteacher assumes the role of Chief Executive within that group. No single colleague has responsibility for the whole of the marketing function, and specific tasks are delegated to individuals. The system is a reactive one, dealing with needs as they arise, and so is characterised by single function delegation on an ad hoc basis.
  
- **Type 3 - the Senior Marketing Manager Model.** Type 3 structures involve the delegation of the responsibility for marketing to a senior colleague, normally a deputy headteacher. This ‘marketing manager’ has



**Type 1 The Chief Executive Model**



**Type 2 The S.M.T. Model**

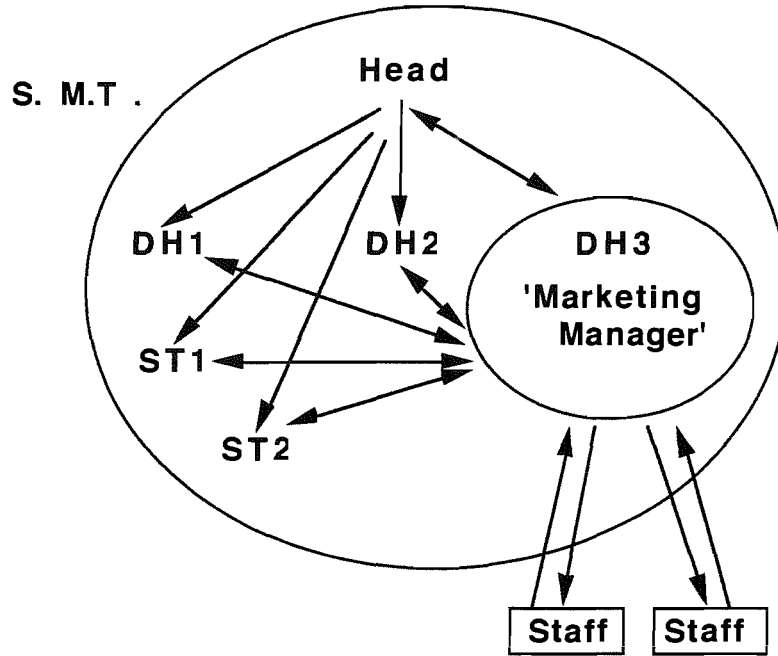
**Key**

SMT = Senior Management Team  
 DH = Deputy Head ST = Senior Teacher

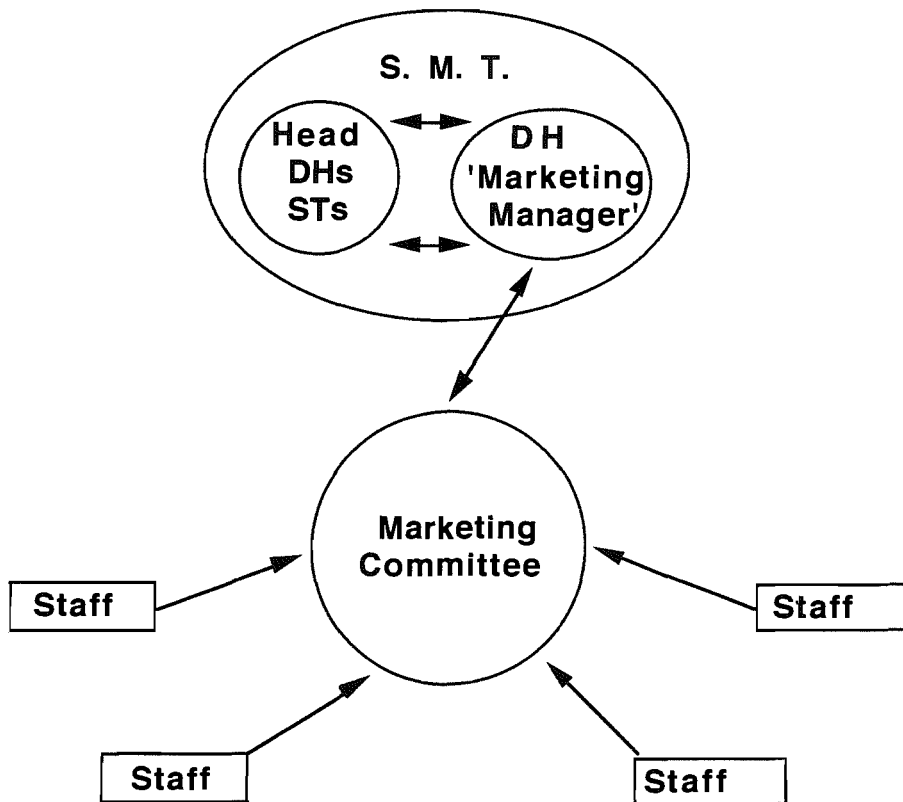
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**Figure 7.1 A typology of organisational structures for marketing (1)**

(.....Continued)



Type 3 The Senior Marketing Manager Model



Type 4 The Advisory Committee Model

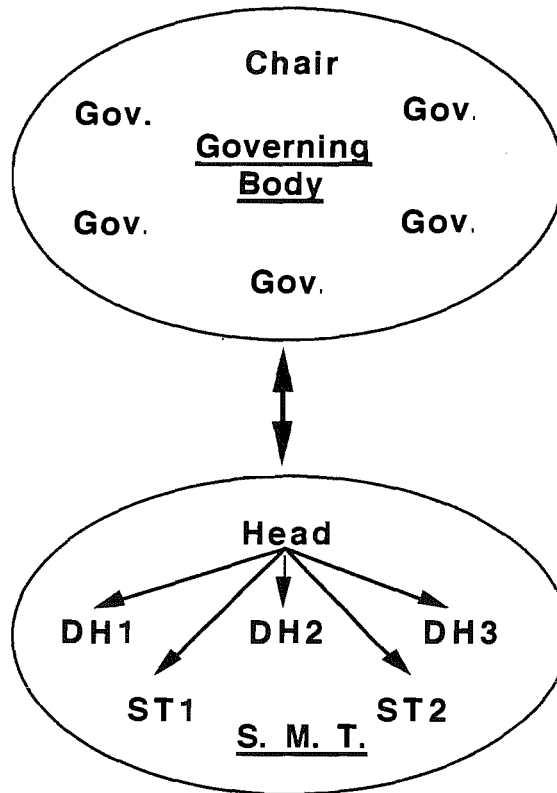
Figure 7.1 A typology of organisational structures for marketing (2)

responsibility for coordinating most or all of the marketing functions , and for providing a strong lead in the policy formulation of the head or SMT. The functional separation of the roles of deputy headteachers into “curriculum”, “pastoral” and “administrative / financial” , is appended with the responsibility for “external relations”, and the postholder provides the leadership and coordinating function for the whole school.

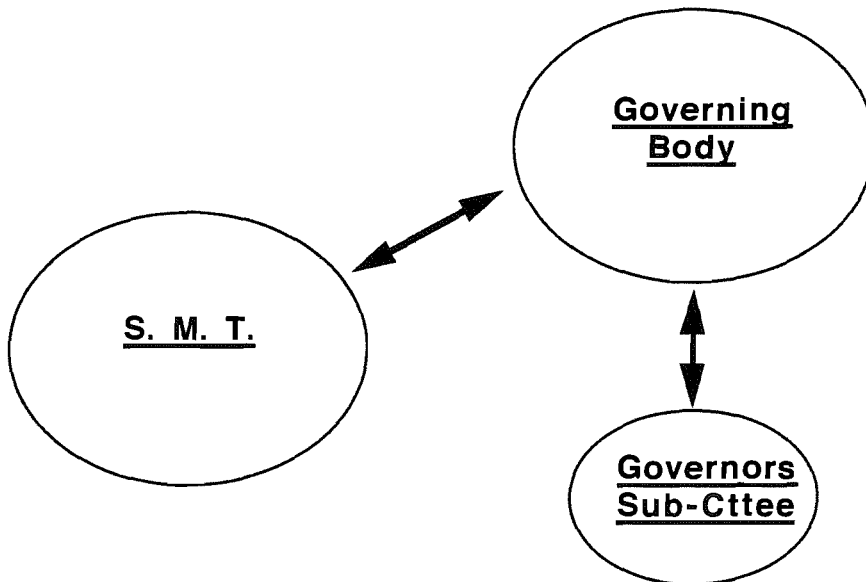
- **Type 4 - the Advisory Committee Model.** In Type 4 structures the development of policy and practice is delegated to a working group which is not synonymous with the SMT. Typically, the group will comprise colleagues from across the staff profile who have functional roles relating to marketing - for example, the Head of Year 7, the I.T. specialist with DTP skills, the Office Manager. The Chair is typically the member of the SMT with overall responsibility for marketing, and so, in many key respects, the Type 4 structure is a modification of the Type 3 structure. The output of the group is usually directed either to the headteacher or to the SMT, for the making of decisions is not delegated to this “marketing group”. Its roles are advisory and creative, and not executive.

These models of organisation do not include reference to the role of the governors within the overall management structure, for a separate typology of their role can be identified. Three models emerge from the case studies - a Whole Governing Body Model, a Governors’ Sub-Committee Model and a Participative Model. These are characterised as follows, and are illustrated in Figure 7.2 :-

- **The Whole Governing Body Model.** In this organisational model, the governing body considers marketing issues only within its full sessions, responding to input from the headteacher and providing guidance, comment and direction to the head and senior colleagues.
- **The Governors’ Sub-Committee Model.** Some governing bodies may have within their structure a sub-committee on marketing and / or public relations. This may occur where the governing body is pro-active in this field, and hence the policies and proposals passing from this



**Type 1 The Whole Governing Body Model**

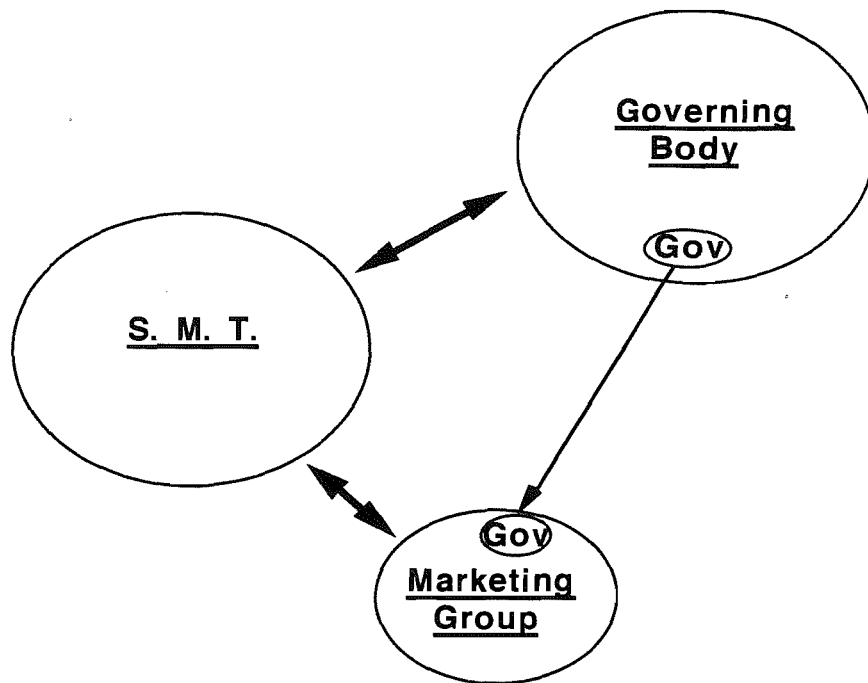


**Type 2 The Governors' Sub-Committee Model**

(Continued.....)

**Figure 7.2 A typology of organisational structures for governing body roles within the marketing function (1)**

(.....Continued)



### Type 3 The Participative Model

#### Key

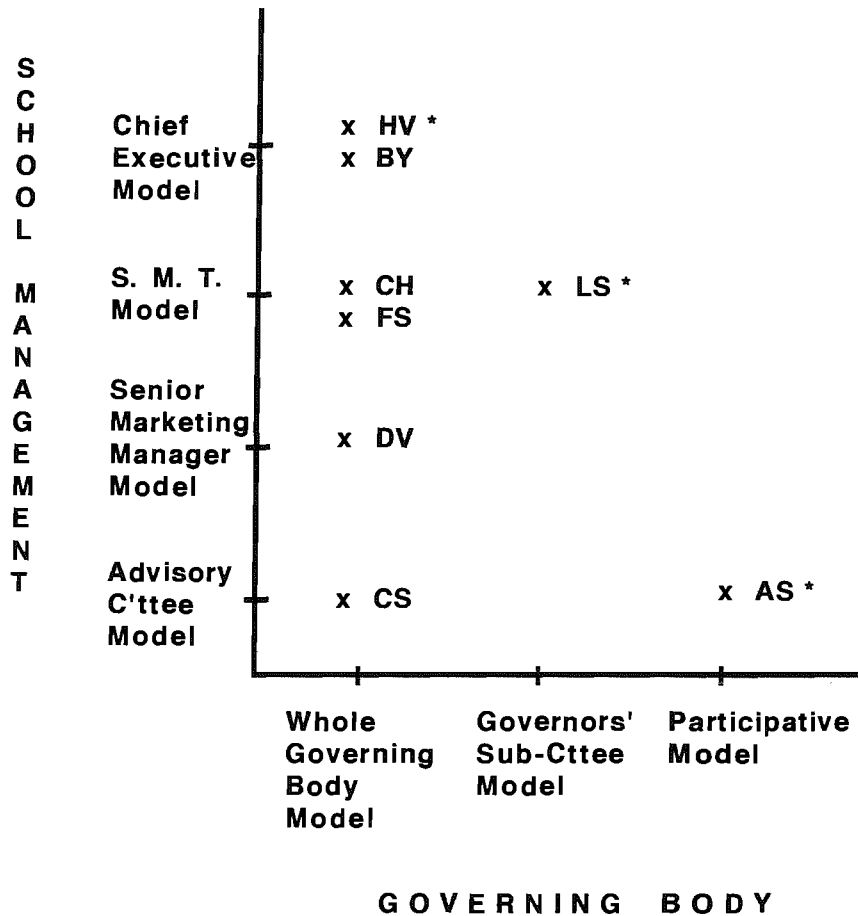
SMT = Senior Management Team Gov = Governor  
DH = Deputy Head ST = Senior Teacher

**Figure 7.2 A typology of organisational structures for governing body roles within the marketing function (2)**

committee will be more influential on practice and organisation within the school.

- **The Participative Model.** The third model involves the participation of the governors in the policy-making and strategic planning within the school's management structure. This might involve the existence of joint SMT / Governor working groups, or, more commonly, the participation of one or more governors in a working group reporting to the SMT.

Using these classifications it is possible to indicate the spread of



**Key**

- CS=CastleSchool
- DV=Downsview School
- LS=The Lee School
- FS = Fenlands School
- CH=Chalklands School
- AS = The Abbey School
- BY = Bycars School
- HV = Hillview School
- \* = Governing Body Pro-Active

**Figure 7.3 Organisational structures within the case study schools**

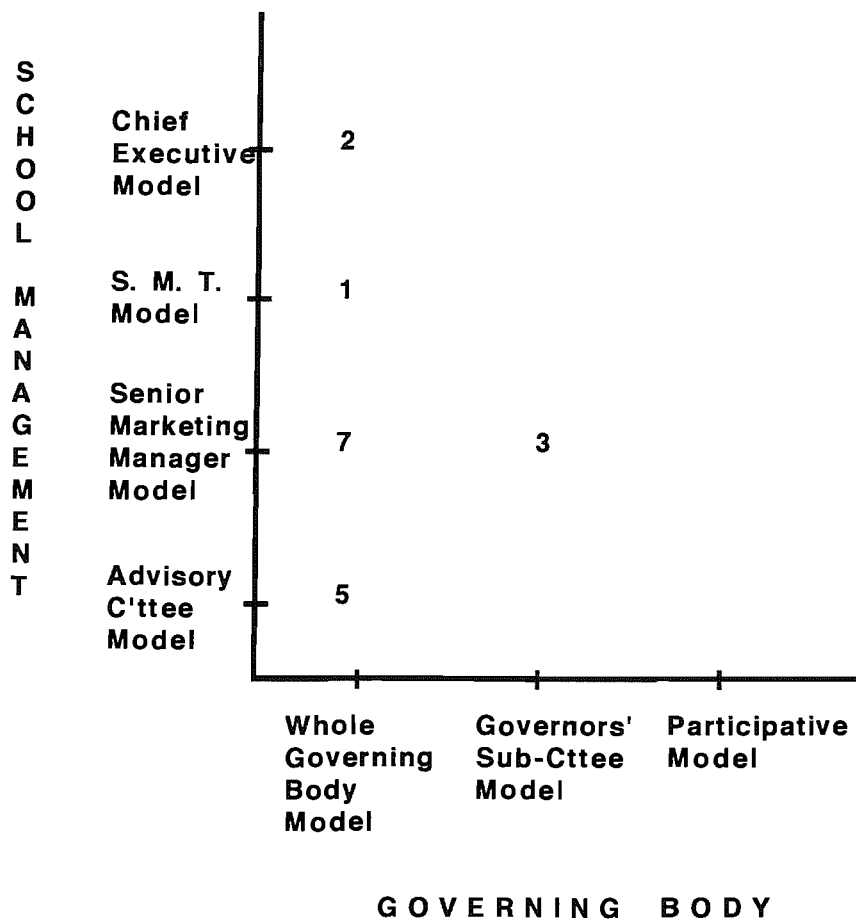
organisational patterns across the case study schools. Figure 7.3 shows this in the form of a matrix with the two dimensions indicating the “In-school” organisational pattern and the governor organisational pattern. The pattern is clearly one of diversity in terms of “In-school” organisation,

contrasting with a rather more consistent pattern of governing body organisation. Marked with an asterisk are those schools where the governing body was pro-active in terms of the marketing of the school. At Hillview School, for example, the dynamism in the governing body in terms of marketing lay with the Chair of Governors, and his participative role was to consult on a regular basis with the headteacher. In The Lee School and The Abbey School the interest was more widespread amongst governors, and lead to the generation of a sub-committee or direct participation in the marketing committee within the school.

A second strand of analysis of organisational structures can be made through the responses to the expert survey. The responses to Question 3 within the 'expert survey' are shown in Figure 7.4, which groups together responses according to the typology of organisational models in the same format as Figure 7.3. The values in the matrix represent the number of schools within each category. As with the case study schools there is a range of organisational structures, but two categories have 83% of the schools within them, while the Senior Marketing Manager Model is found in 55% of schools. In terms of governing body organisation there is a pre-dominance of a Whole Governing Body organisational model, with only three schools (16.6%) supporting governors sub-committees.

The analysis outlined here suggests that the marketing function is predominantly one taken on by senior management within schools. Within the case study schools there is evidence of the direct influence of the governing body in three of the eight schools, although data on this from the expert survey is limited to an indication that three out of eighteen schools have a governor sub-committee. The involvement of colleagues from across the full range of the staff would appear not to be very common. Only two case study schools had marketing committees drawn from across the staff, while only five of the schools in the expert survey operated such a structure.



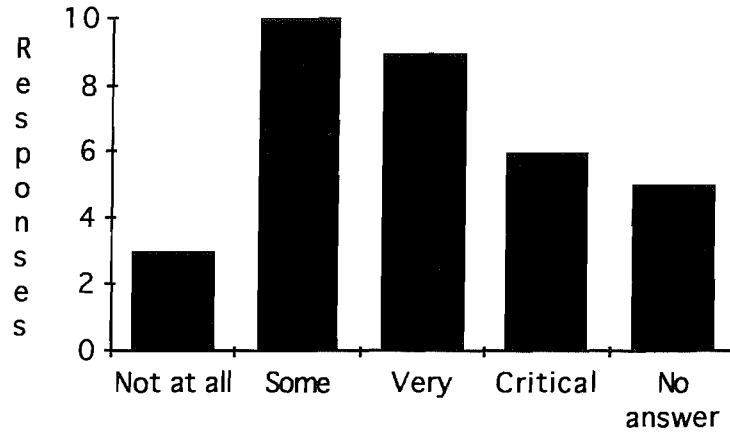


**Key**  
 3 = Number of Occurrences

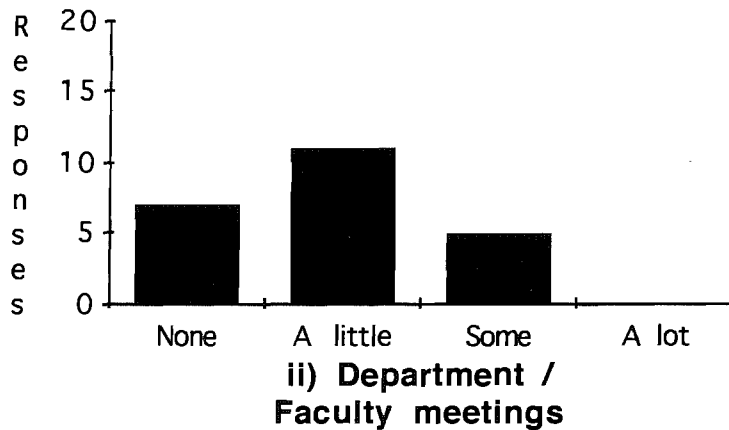
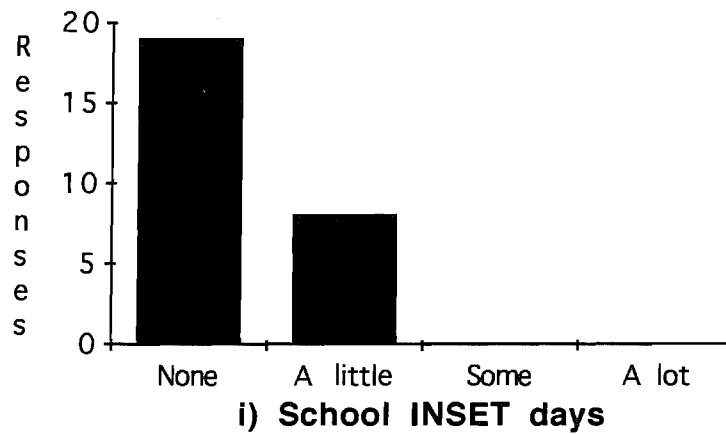
**Figure 7.4 Organisational structures within the expert survey schools**

**7.3.3 Staff Consultation and ‘Internal Marketing’**

The issue of consultation was pursued in the staff sample survey within the case study schools. Staff interviewees were asked “How important do you feel your work is within the whole school’s marketing and external relations (ER) activities ?” (Question B2), and “How much discussion of marketing and ER issues takes place in school INSET days, in departmental / faculty meetings, whole staff meetings and informally amongst the staff ?” (Question C1). Question C2 asked “How much



**a) How important is your role within the school's marketing activities ?**

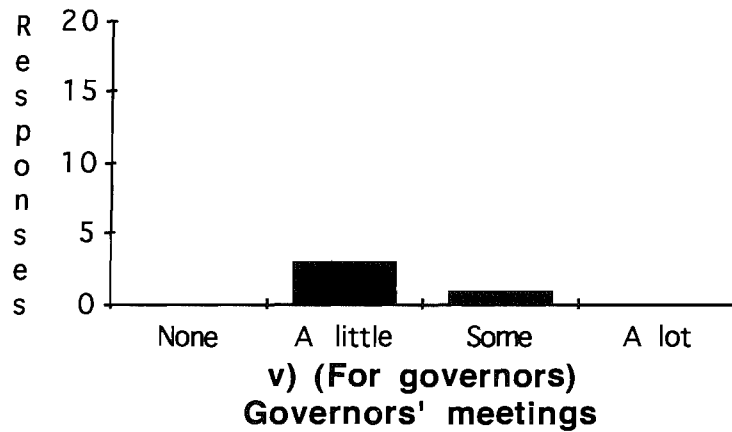
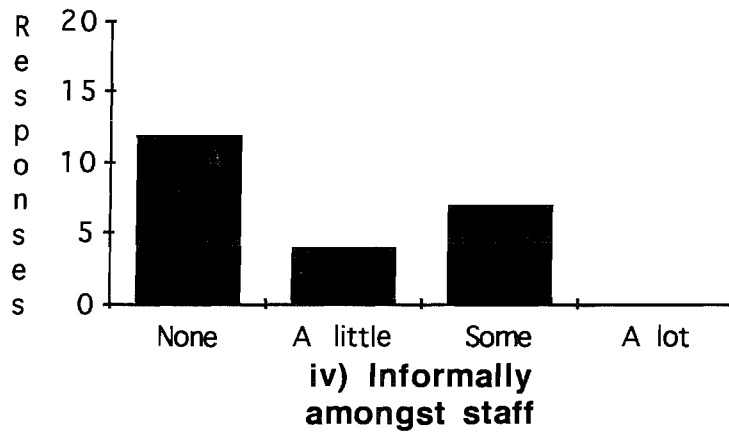
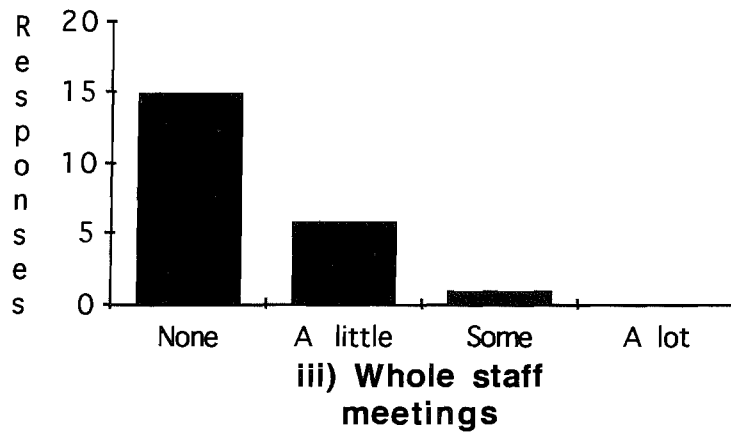


**b) How much discussion of marketing takes place in..... ?**

(Continued.....)

**Figure 7.5 Whole staff views of consultation on marketing in the case study schools (1)**

(.....Continued)

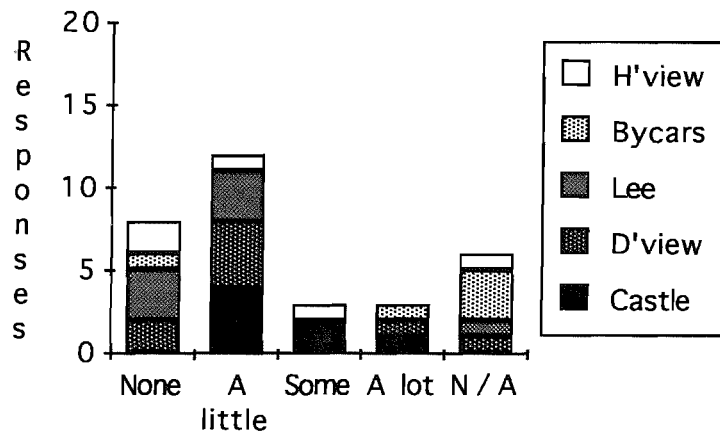


**b) How much discussion of marketing takes place in..... ?**

(Continued.....)

**Figure 7.5 Whole staff views of consultation on marketing in the case study schools (2)**

(.....Continued)



**c) How much influence does the staff as a whole have on school policy ?**

**Figure 7.5 Whole staff views of consultation on marketing in the case study schools (3)**

influence does the staff as a whole have on the formulation of school policy in marketing and ER ?". Figure 7.5 shows the data from these questions. Figure 7.5a indicates that most staff believe their role to be of importance within the school's marketing and external relations activities, and 15 of the 33 respondents (45.5%) perceived their role as being of considerable or critical importance. Within the limitations of the small sample size, similar patterns were identifiable across all the schools. However, Figure 7.5b shows that there is little discussion of marketing in any staff forum within the schools, with discussion limited to departmental / faculty meetings and informal discussions amongst staff. The pattern in the graphs is strongly affected by activities in individual schools. For example, the only case study school in which discussion at an INSET Day had occurred was Castle School in Alcheston, and this accounts for all the responses in the category "A little" in Figure 7.5b.

Figure 7.5c shows how much influence staff feel they have on the

development of policy in relation to marketing and external relations management, and suggests that this is perceived as being “none” or “a little” by most respondents. Only 7 out of 33 respondents felt that they had “some” or “a lot” of influence on policy making.

The data from the staff sample survey suggests that there is only limited consultation by senior management on marketing issues, despite the recognition by most staff that they have an important role within the school's work in this field. How far this is representative of a more general consultation issue can only be speculated upon at this point. However, there is little evidence that the process of “internal marketing” (Robinson and Long (1988)) is occurring within the case study schools.

## **7.4 Planning for Marketing**

### **7.4.1 Marketing and Strategic Planning**

The role and form of planning for marketing within schools has been considered in Chapter 3, with particular reference to the work of Gray (1991) and Hanson and Henry (1992). Within this study the nature of planning was considered for the case study schools and the expert survey schools through the approaches summarised in Chapter 5. In particular, it was intended to investigate whether or not any formal marketing planning process exists within the schools, and if so how this relates to the planning of whole school development. Within the case study schools the planning process was discussed with headteachers in each interview with a focus on whether a school marketing plan exists (Question 6), or whether marketing is found in the school development plan (Question 7).

Of the eight case study schools, none had developed a separate marketing plan, although two indicated that this was an activity that this was planned for the near future. By the time of writing this had not, in fact, occurred in either of the schools. Most headteachers indicated that it was not an issue they had considered, although one suggested the idea had been considered but rejected as inappropriate:-

“I work in entrepreneurial mode and have an ad hoc approach to dealing with marketing”

(Headteacher, Hillview School)

Within the broader spectrum of school development planning, all the schools indicated that they had a School Development Plan (SDP), although these were at varying stages of production. Downsview School in Alcheston had an SDP updated on an annual cycle, and The Abbey School in Norbridgeshire was.....

“In our fifth development plan, and we’re now getting it right”

(Headteacher, The Abbey School)

In contrast, The Lee School had only a “third draft version” dating from the summer preceding the initial interview.

The presence of marketing within the SDPs varied, and four responses might be identified. Firstly, one school’s plan contained a separate section on “Marketing”. Secondly, Hillview School’s plan included reference to marketing within almost every section, with the headteacher indicating that “marketing underpins everything in there”. This stood in contrast to his assertion of an ad hoc approach to marketing recorded above. Thirdly, in two schools there are sub-sections of other substantial plan elements which made reference to marketing. At Fenside School the targets for the year included the need to increase public awareness and use of the new sports barn and music facilities, and so a section on “Marketing the New Buildings” was present in the SDP. The fourth approach is one in which there is little or no overt reference to marketing within the Plan, and four of the case study schools SDPs might be categorised in this way.

In the case study schools the planning of marketing, therefore, is not focused through marketing plans either within or outside the SDP. The implication is that marketing practice must be lacking in integration, and

subject to single event planning on an ad hoc and reactive basis.

In the expert survey a rather different pattern emerged. Question 4 investigated the nature of planning. While all the schools have an SDP, only two indicated that they have a separate "Marketing Plan". The other 16 cover marketing issues within the SDP. Amongst the latter group, half (8 respondents) indicate that the SDP covers marketing issues in a few places, but not as a separate field, while for the other half (8 respondents) marketing has a high profile within the SDP.

The 'expert survey' identified a number of schools (5 out of 18, or 27.7%) where marketing issues are an overt part of the planning process undertaken by heads of department or pastoral team heads. In the case study schools this was the case in only one school, Downsvie School. This might suggest that in schools with a well-developed marketing culture there is delegation of parts of the planning process to middle management, to operate in the policy framework developed at SMT level.

#### **7.4.2 The Planning Process for Marketing**

The planning models for marketing developed by Gray (1991) and by Hanson and Henry (1992) contain the tasks of:-

1. Review and needs identification in relation to long term aims / mission,
2. Audit (internal and external), including resource and financial appraisal and marketing research
3. Goal setting
4. Devising tactics, with appropriate evaluation indicators and set in to the context of budgetary planning
5. Implementation
6. Evaluation and review.

A number of elements of this study considered current practice in relation to such a rational process-based model.

Within the case study schools marketing planning is only poorly related to a model of rational decision-making. One of the headteachers indicated that “we plan in a haphazard way” (Headteacher, Castle School), while at Fenside School the process was seen as a reactive one with the SMT planning event by event and the headteacher then delegating responsibility to appropriate individuals. For example, the formal opening of the new sports hall, had been delegated to a deputy head, and the establishment of a ‘writer-in-residence’ scheme had been delegated to the Head of English. In neither case had the activities been subsequently monitored in implementation (although they were to be evaluated post hoc), nor were they linked to any long term strategic goals for the school. Where planning is the responsibility of either the SMT or a marketing group the work is almost entirely focused on individual events and their organisation, with little time for strategic thinking in the process. This can be exemplified in relation to three specific facets of the planning process - marketing research, evaluation and budgeting.

Marketing research (Davies and Scribbins (1985)) refers to all aspects of investigation of the market, and includes analysis of the market (size, nature etc), a consideration of competitors, and a knowledge of ‘buyer behaviour’ - the ways in which customers make and exercise their choice. Question 14 in the headteacher interviews asked what marketing research had been undertaken in / by the school. In all the schools very little marketing research had been undertaken, mostly for reasons of time and financial constraint. However, in two schools the absence of marketing research was explained in terms of a concern for its value at the scale of analysis that would be possible by the school. The headteacher of Bycars School indicated that

“We’ve never done any (marketing research), because I believe the results would be ambiguous and hence very questionable”

(Headteacher, Bycars School)

while the headteacher at Hillview School said that



“No formal market research has been undertaken, but it doesn't tell you anything so it is not much use”

(Headteacher, Hillview School)

In only one school had small scale marketing research been undertaken, which had included a questionnaire to parents to investigate their reasons for choosing the school. In four others data had been collected in an ad hoc way in relation to the evaluation of specific events, or to evaluate communication methods (eg new report formats). None of the schools was able to provide market data beyond the numbers of pupils in each year group and their feeder school if they had come from a 'catchment' feeder school, because the data had never been systematically collected. It is clear that the process of marketing research is not a significant process in these schools.

The evaluation of marketing activities by schools was investigated by Question 8 within the headteacher interviews. This gave scope for respondents to discuss evaluation, and where this was not forthcoming the interviewer asked how far the school evaluated its marketing practice. Only one of the schools (in Norbridgeshire) had undertaken any formal evaluation process in terms of marketing, by using a response sheet in a new style pupil report to parents. Two schools (Fenside and Downsview) had a formal system of SMT reviews of each event, but this was informal in structure. The other schools either had no evaluation process (4 schools) or relied on unsolicited feedback from any source that might provide it. At Hillview School the headteacher operated a “formal-informal” system, in that he pursued an evaluation policy of...

“...talking to everybody and measuring by my own yardstick. (.....) I judge (success) by customer satisfaction”

(Headteacher, Hillview School)

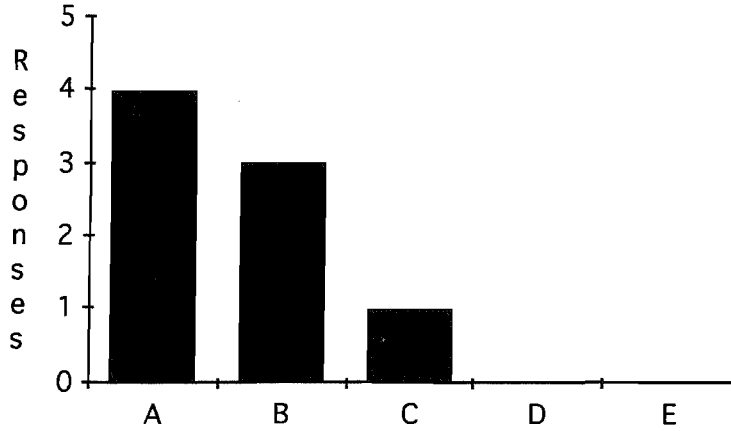
By the time of the final headteacher interviews in Alcheston some development in evaluation had occurred. All three headteachers were planning or had started to undertake some formal evaluation. At Castle

School each parents evening or open evening included the use of an evaluation pro-forma issued to parents as they arrived. At Downsvie School a record was now kept of enquiries from out-of-catchment parents, and the headteacher was planning a questionnaire survey of the headteachers of main feeder schools. Both the headteachers at Castle School and Downsvie School were by now able to provide data on the proportion of children living in the catchment who were actually attending the school, which they had been unable to do earlier. At The Lee School the new headteacher had undertaken a formal evaluation of open days and parents evenings by means of a questionnaire to staff. Despite the progress in the amount of evaluation, though, there were still concerns about the cost-benefit and time-benefit of formal evaluation in a complex system, and the headteachers recognised the limitations of what they were able to achieve.....

“We do no real evaluation, even though we keep some records. Evaluation is very difficult - for example, how can we judge if the prospectus works - there are too many variables”

(Headteacher, Downsvie School)

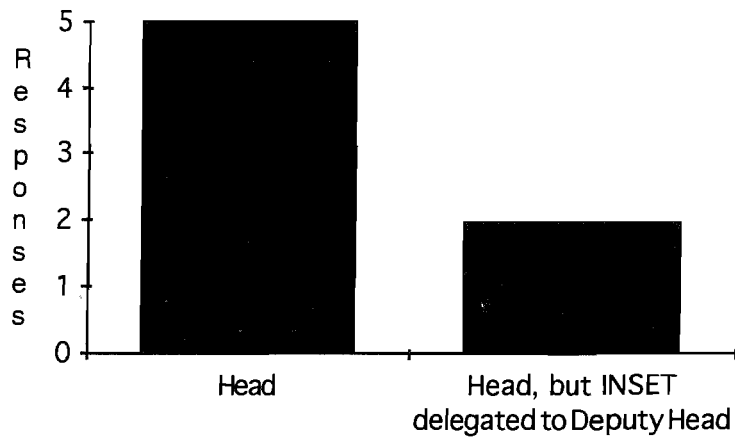
The third dimension of the planning process which the study considered was that of financial planning. The headteacher interviews asked “How is the budget for marketing activities calculated and allocated?” (Question 12) and “Who holds the budget for marketing activities ?” (Question 13). Figure 7.6 shows the pattern of responsibility and planning which this demonstrated. The allocation of funding to marketing demonstrated three different methodologies ie budget a fixed amount in the annual budget, then allocate this to marketing tasks on an ad hoc basis (Method A in Figure 7.6a); allocate the funding on an ad hoc basis throughout the year without identifying a global sum in the budget (Method B) ; budget a fixed amount linked to the needs of the SDP or Marketing Plan (Method C). Figure 7.6a shows that seven out of the eight schools used either Method A or Method B. Where a budgetary allocation was made this was an historically-based calculation. Following Davies and Scribbins (1985) it is reasonable to postulate two other possible



**Key**

- A = Fixed budget (historical) and ad hoc allocation
- B = Ad hoc allocation
- C = Fixed budget linked to plan
- D = Match what other schools spend
- E = Linked to pupil numbers

**a) How is the budget calculated and allocated ?**



**b) Who holds the marketing budget ?**

**7.6 Marketing budget planning and delegation in the case study schools**

budgetary methods - allocating a budget determined by a recognition of what competitor schools appear to be spending (Method D); or allocating a budget that is proportional to pupil numbers (Method E). Neither of these methodologies was identifiable here.

The level of expenditure on marketing was difficult for the case study schools to identify. Only one school had a separate budgetary category (entitled "public relations"), and most could identify clearly only the expenditure on the prospectus. Other expenditure came from, for example, the INSET budget, or Minor Works (for example for signs and noticeboards), but this meant.....

"Budgeting (on marketing) is random. The prospectus is an identified cost and is costed properly, but others are on an ad hoc basis with a reactive system of budgeting"

(Headteacher, Fenside School)

Figure 7.6b shows the pattern of financial control in relation to marketing. In all cases the headteacher holds, controls and allocates the budget. However, delegation of the INSET budget to one of the deputy headteachers means that training for marketing might be undertaken at the discretion of a budget holder below the level of seniority of the headteacher. In none of the schools was the budget delegated to the 'marketing manager'.

The data from the modified Delphi survey provided a further perspective on budgeting and evaluation. Question 9 asked "How do you evaluate your marketing practice and plan for future activity ?", while Question 10 focused specifically on budgeting and asked "How does your school budget for expenditure on marketing / external relations activities ?" In each case respondents were asked to select as many answers as they thought appropriate to their own circumstances from a list of strategies (Appendix 8). Figure 7.7 shows the responses to these questions.

Methodology	Frequency of Use				
	F	S	R	N	NA
a. Annual review by the SMT or Marketing Group	9	3	2	2	2
b. Subjective judgement of each activity	10	5	0	0	3
c. Informal questioning of pupils / parents	6	8	2	0	2
d. Unsolicited feedback from eg parents	7	10	1	0	0
e. From formal questioning of parents	3	7	3	4	1
f. Review by SMT / Mktng group of each activity	6	6	1	3	2
g. Review against "performance indicators"	3	4	2	6	3
h. Using marketing research by the school	1	6	2	5	4
i. Using marketing research by an outside agency	1	1	0	12	4
j. Using other methods	3	3	0	1	11
- Analysis of Applications / Enquiries	1	0	0	0	0
- Feedback from feeder schools	0	1	0	0	0
- Pupil questionnaires	0	1	0	0	0
- Feedback from PTA	2	0	0	0	0
- SWOT Analysis with staff, parents /pupils	0	1	0	0	0

**Key**

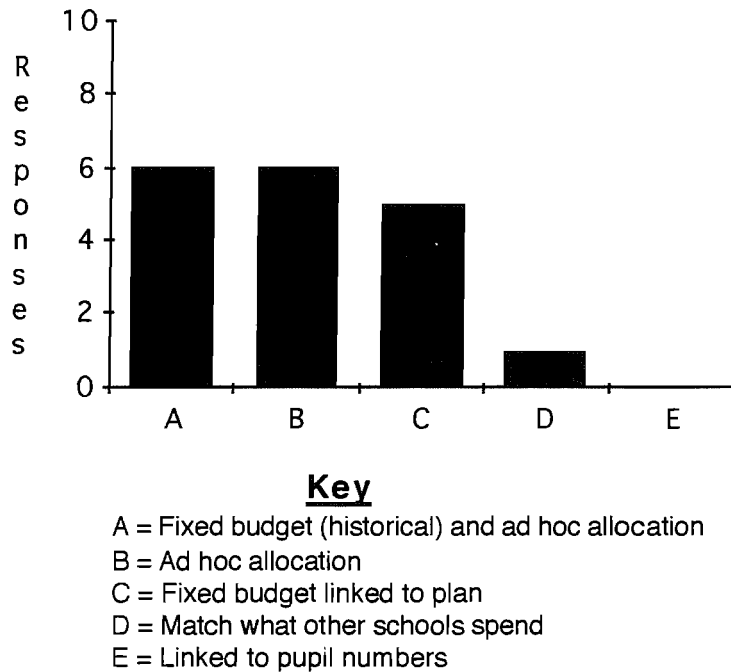
F = Frequently S = Sometimes R = Rarely N = Never N/A = No answer

**a) Evaluation Methodologies**

(Continued.....)

**Figure 7.7 Marketing planning methods amongst the 'expert survey' schools (1)**

(.....Continued)



#### b) Budget calculation and allocation

**Figure 7.7 Marketing planning methods amongst the 'expert survey' schools (2)**

Half of the schools (9 out of 18) have undertaken formal marketing research, with 7 of those schools undertaking such research from within their own resources either 'sometimes' or 'frequently'. Only two schools use outside agencies such as consultants to provide marketing research services, and 12 out of 18 (66.6%) said they had never used such an approach. A number of singular examples of marketing research were reported by the respondents in the category of "other methods". This included one instance of the analysis of applications / enquiries about admissions, and another school which had undertaken a SWOT Analysis not just with staff but with parents and with pupils in Years 7 (the youngest pupils) and 13 (the oldest). One school had established a formal feedback system through "Parent Consultation Groups", which had provided a range

of market data. Clearly the boundary between marketing research and evaluation is not a clear one. All the schools undertook some form of evaluation. Half the respondents (9 out of 18) indicated that their school's SMT undertook a formal annual review of marketing, and a further three indicated that this was done 'sometimes'. One third of the schools 'frequently' reviewed each marketing activity at SMT level, and a further one third of the schools did this 'sometimes'. However, in most cases this evaluation was subjective in nature, and only three of the responding schools indicated that they 'frequently' evaluated activities against pre-set performance indicators. The overall picture is one in which post-hoc evaluation is frequently undertaken in relation to specific marketing activities, although often in an informal way. However, marketing research is generally poorly developed.

Figure 7.7b shows the pattern of budgeting revealed by the 'expert survey'. Methods A, B and C show approximately equal usage. Two thirds of the respondents used a method in which the budget is calculated to meet pre-identified tasks for the year, with half relating this to a marketing plan or school development plan and the other half establishing these priorities each year. One third of schools allocate finance to marketing on an ad hoc basis as tasks arise. Only one of the two alternative strategies identified by Davies and Scribbins (1985) (Methods D and E, outlined earlier) was found to be used by one school only, in which the budget is driven by what is necessary to match the marketing activities of competitor schools.

The evidence from the expert survey schools suggests that there is only limited practice of formal rational planning in relation to marketing. However, more components of such a process are in place than in the case study schools together with a wider range of evaluation systems, and some evidence of marketing research.

Overall, though, within the study it is clear that planning is characterised by an ad hoc, reactive process, with two important characteristics:-

- An absence of key elements in the planning process. Marketing research is very limited in extent and is not perceived as being of particular value by schools, which we might expect where the whole marketing concept is being questioned. However, we might expect that evaluation would be in place as a generic process to all educational activities, including management and curriculum fields. The evidence from this study is that evaluation is by no means universally practised.
- Limited linkages between the components of the planning process. In particular there is little linkage between financial resource allocation and the rest of the planning process, and where it is present the funding for marketing is often a residual sum after allocations to other fields eg curriculum have been made. This supports a view that marketing is perceived in reality as an optional extra to the management of the school, which is dependent on some resources being left over for it. The funding of marketing appears, overall, not to be driven by long-term strategic planning.

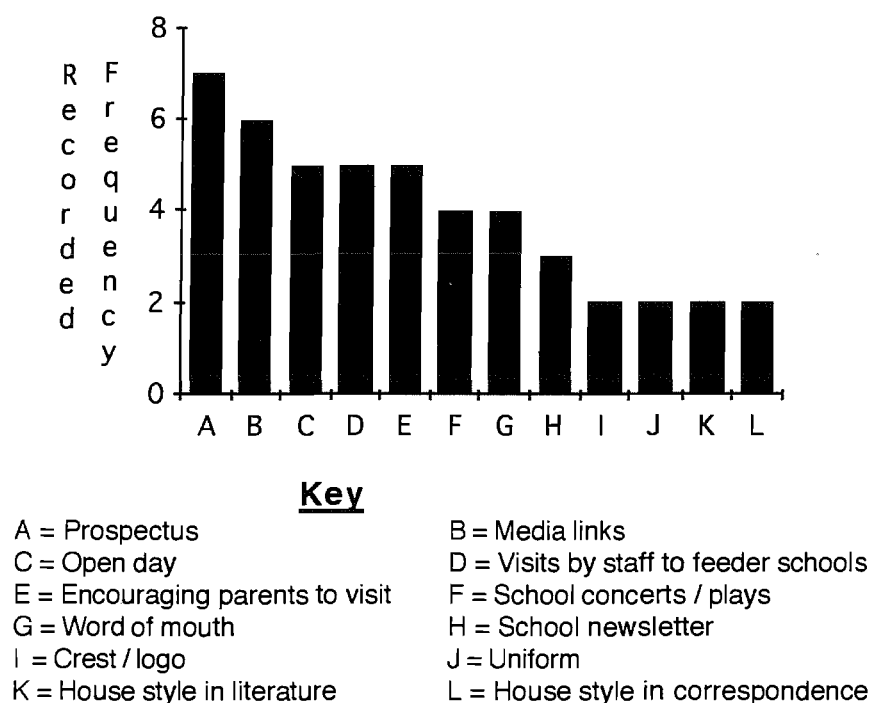
## **7.5 Marketing Strategies, Tactics and Methods**

Sub-question 2.3 considers the strategies that schools are deploying in their practice of marketing. Much of the early literature in education marketing concentrated on such strategies and their application to schools (eg Devlin and Knight (1990); Davies and Ellison (1991); Marland and Rogers (1991)). It is asserted here that this created a perception within schools that marketing was no more than the application of these techniques, which are essentially promotional methods, and that an element of the negative response to the concept of marketing in schools was quite possibly this equating of marketing and promotion, and its connotations of unscrupulous and misleading 'selling' processes. This element of the study seeks to identify what strategies and tactics schools have chosen to use, and how effective they deem them to be.

The pattern of promotional strategies emphasised by the case



study schools is shown in Figure 7.8. Within the headteacher interviews Question 15 asked what promotional methods were being used by the school. Devlin and Knight (1990) present a list of 52 promotional methods that schools might use (Devlin and Knight (1990): 40), but in using an open response interview schedule it was not expected that headteachers would list more than five to ten. The data in Figure 7.8, therefore, represents the methods most frequently mentioned by the headteachers.



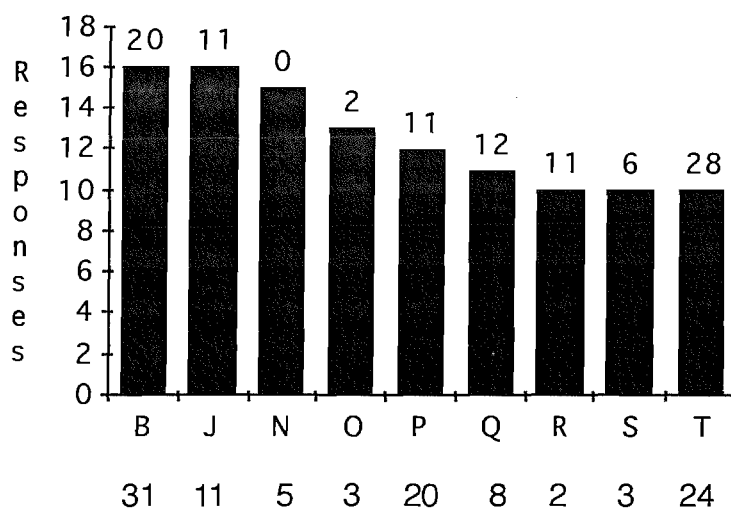
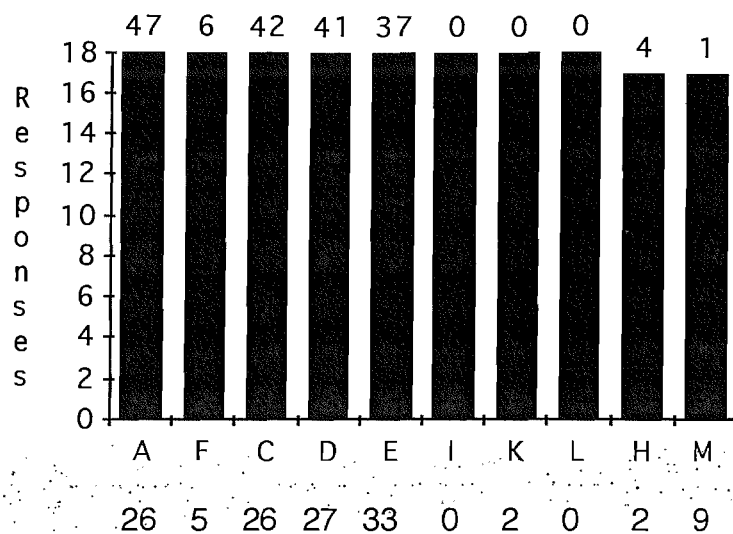
**Figure 7.8 Principal promotional methods used in the case study schools**

The most commonly mentioned promotional strategy was the use of the prospectus. Statutory Requirements (The Education Act (1981)) require the production of a prospectus, and although legal obligation does not necessarily make the prospectus the key promotional tool, in the case study schools it is of central importance. The headteachers talked extensively about the prospectus, and its re-design was either in hand or had occurred within the previous two years. Six other promotional strategies dominated the headteachers comments - good links with the

media; the use of open days / evenings; visits by staff to feeder schools; showing “prospective parents” around the school; the high profile of school concerts and plays; and the use of a school newsletter. All were seen to contribute to the importance of “word of mouth” recommendation by the local community.

Two issues emerge from the data. Firstly, the seven key dimensions are characterised by their basis in traditional external communications by schools. None are a creation of the new market place. It would appear, therefore, that schools are simply building on existing “known” practice and their own perception of “good practice” rather than moving into substantially new areas of activity. Secondly, however, the emphasis placed upon such communications by the school, and their relative importance may have changed. This is well exemplified by the role of media links. In only one of the schools, Bycars School, was there a tradition of strong media links, with the headteacher positively cultivating publicity, with substantial media coverage and the head’s frequent appearance on radio and television to discuss education issues. In 1989 the school had been the subject of a television documentary focusing on the daily life of the school. In contrast, the role of media links in the other schools was developing. At Downsvew School, for example, a deputy headteacher had recently been given responsibility for media links, and at Fenside School the local newspaper editors had been invited into the school to discuss the enhancement of links.

The ‘expert survey’ explored the issue of promotional methods by asking respondents both to indicate the methods they use and also to consider the effectiveness of each method in terms of short-term recruitment issues each year and long term issues of image (and hence recruitment). Question 8 in the survey provided a list of promotional methods compiled from a consideration of the list of Devlin and Knight (1990: 40) and the responses of the headteachers in the case study schools.



### Key

**NB The same symbols are used as in Figure 7.8 to facilitate comparison**

A = Prospectus	B = Media links
C = Open day	D = Visits by staff to feeder schools
E = Encouraging parents to visit	F = School concerts / plays
G = Word of mouth	H = School newsletter
I = Crest / logo	J = Uniform
K = House style in literature	L = House style in correspondence
M = Encouraging industrialists to visit	N = Advertising events
O = Links with former pupils	P = Staff development on 'quality' issues
Q = Advertising the school	R = Use of a 'flyer'
S = Special prospectus (eg Y12)	T = Visits to feeder schools by pupils

**Upper scores = Relative importance for short-term recruitment(see text)**

**Lower scores = Relative importance for long-term recruitment (see text)**

**Figure 7.9 The principal promotional methods used in the 'expert survey' schools**

Figure 7.9 shows the data from this survey, expressed in three ways:-

- The columns show the number of respondents identifying a particular promotional method as one they use, with the methods plotted in order of frequency of mention.
- The figure above each column indicates the importance of the factor for short-term, ie annual, recruitment as identified by the schools. Each respondent identified the five most important activities in order of their judgment of their effectiveness, with 1 indicating the most important factor and 5 the fifth most important. To take account of differences in the frequency of each factor being mentioned the data was manipulated in the following way:-

- the rankings were allocated a 'value' with a ranking of 1 scored as 5, a ranking of 2 scored as 4 and so on
- the values were then totalled to give a measure of the relative importance of the different factors.

The figure at the top of the column is this calculated summative value

- The figure at the base of each column records the relative importance of the factors for long term recruitment, calculated in the same way as for short-term importance .

Of the 26 strategies listed 12 were in use in more than 16 of the 'expert' schools, and 21 were used in at least 9 (50%) of the schools. All of the methods were used in at least one school, and respondents indicated two other methods not listed. The range of strategies used is very wide, and includes both methods that might be regarded as based in traditional educational practice (eg concerts) and those developed as part of a marketing tradition (eg advertising the school).

Within this wide gamut of promotional strategies, however, it is important to identify those which are regarded as important in the recruitment of pupils, both in the short-term and the long term. The

summative values in Figure 7.9 enable a number of conclusions to be made:-

a) For short-term recruitment purposes.....

- the prospectus for parents is the most important promotional tool, with open days / evenings, visits to feeder primary schools by staff, and the encouragement of parents to visit also being seen as very important. All of these strategies are used by all of the schools.
- visits to feeder schools by pupils are only undertaken by just over half of the schools surveyed, yet are regarded as very important in short-term recruitment strategy. The smaller numbers using what is perceived as a valuable strategy suggests that this method is comparatively new within the school marketing environment.
- media links are of some importance, being a feature of the marketing activity of almost all the schools surveyed, and with a summative value of 20, compared to 47 for the prospectus.
- many of the traditional aspects of promotion of the school eg the use of a crest, or school concerts, are present in all or most of the schools but have low summative scores. This does not indicate that they are of little or no value in recruitment terms, but that few if any schools regard them as being amongst the five most important strategies.

b) For long-term recruitment purposes there were fewer responses from the 'experts' in the survey, but the following ideas may be identified.....

- a broadly similar pattern of importance emerges from the data, with the prospectus, open days, visits to feeder schools by staff and by pupils being regarded as important
- the most important factors are identified as the encouragement of parents into school and the development of media links. This may be seen as a reflection of the overall importance of 'word-of -mouth', since these activities act as starting points for a cascade system of information flow through the local community. Media links, in particular, represent an information pathway to members of the community with no direct links with

the school. Related to this issue of communication into the community is the greater importance for long-term recruitment of encouraging visitors from the business / industrial sector, since they might be regarded as important in influencing the broader community perceptions of a school.

- a factor which emerges from a relatively low level of importance for short-term recruitment to a more important role in long term patterns is that of staff development on quality issues. This would suggest a recognition of the importance of quality in the projected image of the school .

Using the seven key factors identified as the most important promotional methods in the case study schools and three levels of factor significance identifiable in the expert survey for both short term and long term recruitment, it is possible to generate the model shown in Figure 7.10. This locates the methods used by the 'expert survey' schools in terms of their importance on the two time scales, and indicates with an asterisk the factors regarded as important by the case study school headteachers. Using this model it is possible to look at similarities and differences between the case study schools and the 'expert survey' schools. Of the seven important factors four appear in the 'very important' category for both time scales in the expert survey, and media links appears in the 'very important for long term recruitment' category and of 'some importance' for short-term recruitment. Two factors (school concerts / plays and school newsletters), however, appear in the 'little importance' category for both time scales for the 'expert survey' schools, and demonstrate a notable difference in perception between the two groups. This might be accounted for by the relative difference in experience of marketing between the two groups, and the lesser degree of evaluation and marketing research by the case study schools. It may also be the result of differences in the nature of the market place within which the two groups of schools are operating.

An important factor for the case study schools is 'word-of-mouth' promotion - the role of the "gossiping classes", the "chattering classes" and "school gate endorsement", whose importance has been highlighted by, inter alia, Beischer (1994) and Deakin (1994). This does not appear within the 'expert survey' data, though, since it represents a second phase

<b>S H O R T  T E R M  R E C R U I T M E N T</b>	<b>Very Important</b>			*Prospectus *Open day *Staff visits to feeder schools *Visits by parents Pupil visits to feeder schools
	<b>Some Importance</b>	'Flyer'	School Uniform  Advertising the school	* Media links  Staff devpt on quality issues
	<b>Little Importance</b>	*School concerts Crest / logo *School n'letter School 'identity' Advertising events Links with ex-pupils Special prospectus	Industrialist visits	
		<b>Little Importance</b>	<b>Some Importance</b>	<b>Very Important</b>

**LONG TERM  
RECRUITMENT**

**Key**

\* Seven key factors identified by headteachers in the case study schools

**Figure 7.10 A model of factor significance in long-term and short-term pupil recruitment in the 'expert survey' schools**

process resulting from other promotional activities. It is asserted here that it is driven in part by all of the factors recorded in Figure 7.10, which suggests which factors are 'very important' in driving the 'word-of-mouth' processes by creating positive images about the school.

Although there is evidence of some evaluation of promotional methods by schools, it is clear that evaluation is based principally on subjective judgments. The survey of parents and pupils within the case study schools indicated the principal customers' most important sources of

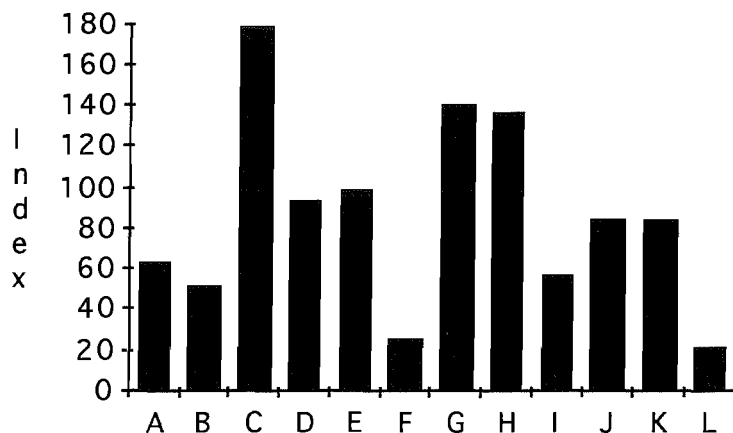
information and so can provide some objective view of the validity of the schools' judgments. In considering this, however, it is important to bear two ideas in mind.

Firstly, it is not clear that parents and pupils are necessarily clear about the reasons behind their choice. While they may be able to evaluate the importance of short-term stimuli ( for example, whether the prospectus was useful and persuasive or not), their ability to see inside the long-term drip-feed effect of, for example, community perceptions about schools or even the influence of their own value systems in filtering the information flow, will not be strong. They may be giving simple explanations in terms of tangible variables to explain a much more complex and 'black box' decision process.

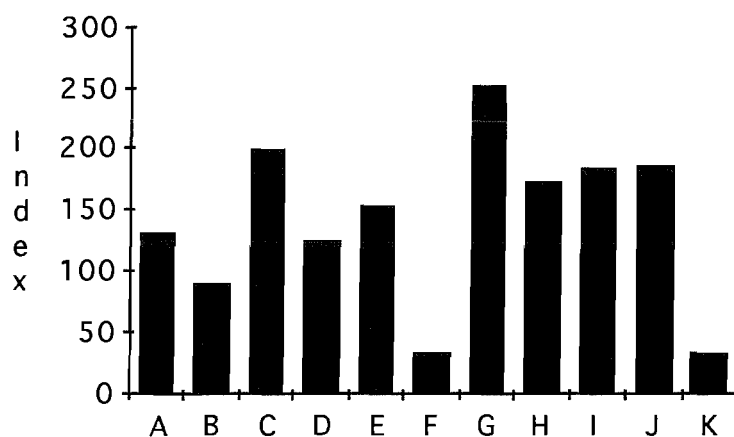
Secondly, it is considered here that schools may be able to manipulate the market by their choice of promotional techniques. It may, for example, be leading parents and pupils to regard some factors in the decision-making process as being more important than others by telling them they are important. For example, a school with excellent concerts and school plays might indicate that this wider range of extra-curricular provision is essential to an effective educational environment, and this may indeed reflect a genuinely held belief by the school. This, however, is clearly a subjective judgment, and other schools may not agree, or may stress other elements of their environment. If parents then use this as a criteria for judging other schools in the region, then it might be seen that the market has been manipulated by one of the players in the market.

Figure 7.11 shows the responses to Question 4 within the pupil and parent questionnaires. These asked "Where did you find out information about the school when you were making your choice ?" and gave eleven options and an "other" option, with a response choice of "A lot", "Some" and "None" in terms of how much information they obtained from each source. The data displayed in the graphs is an index of importance for each factor, calculated by awarding a score of two points for a response of "a lot" for each factor and one point for a response of "some".





a) Parental sources of information in school choice



b) Pupil sources of information in school choice

**Key**

**For parents**

- A = Pupil's class teacher
- B = Primary school headteacher
- C = Booklet / prospectus
- D = Child's brothers / sisters
- E = Friends / colleagues
- F = Media
- G = Visit to the school
- H = Open day
- I = Other parents at the primary school
- J = Other parents at the secondary school
- K = Talk by teachers visiting primary school
- L = Other

**For pupils**

- A = Class teacher
- B = Primary school headteacher
- C = Booklet / prospectus
- D = Brothers / sisters
- E = Friends
- F = Media
- G = Visit to the school
- H = Open day
- I = Parents
- J = Talk by teachers visiting primary school
- K = Other

Index - see text for explanation

Figure 7.11 Parent / pupil sources of information for school choice

The data indicates that each of the sources identified played a role in the information provision, but that a number of processes emerge as being of more importance. For parents the three most important sources of information are the booklet / prospectus, a visit to the school, and the school's open day / evening. For pupils the three most important information sources are a visit to the secondary school, the prospectus / booklet, and with almost an equal index score, a talk by teachers from the secondary school in the primary school and information from their own parents. A number of key points are identifiable.

- Three of the five factors identified by schools (see Figure 7.10) as very important for short-term and long-term recruitment emerge as the three most important factors for parents - the prospectus, visits to school and the open day. Visits to feeder schools by secondary school staff are also of some importance (Index = 84).
- Four of these five factors are regarded by pupils as very important, with the talks by secondary school teachers in the primary school assuming a more important role.
- The role of the media, identified by schools as of some importance for short term recruitment and very important for long-term recruitment is not regarded as important by pupils or parents.
- Pupils regard the information that their parents have collected as a factor of great importance in making their decision.
- The factors considered by the questionnaire may be divided into those which the schools control (prospectus, brothers / sisters experiences in school, visits to the school, open day, and talks by teachers) and those which are the product of "community knowledge" of the school, and hence might be regarded as the core of 'word-of-mouth' recommendation (pupils class teachers, primary head teachers, friends / colleagues, media, parents at primary school, parents at secondary school). If the total index for these two groups is calculated, the results are as indicated in Figure

	Parents	Pupils
<b>School Controlled Factors</b>	635 (62.3%)	916 (60.6%)
<b>Community Knowledge</b>	383 (37.3%)	596 (39.4%)

**Figure 7.12 School-controlled and community knowledge information in school choice (parent and pupil summative index)**

7.12. This suggests that for both parents and pupils schools have more direct influence upon the decisions made than does 'word-of-mouth' in terms of positive decisions about schools. However, it is not clear whether decisions not to choose a school are influenced in the same way, and it may be the case that 'community knowledge' is more influential in persuading parents and pupils not to go to a particular school.

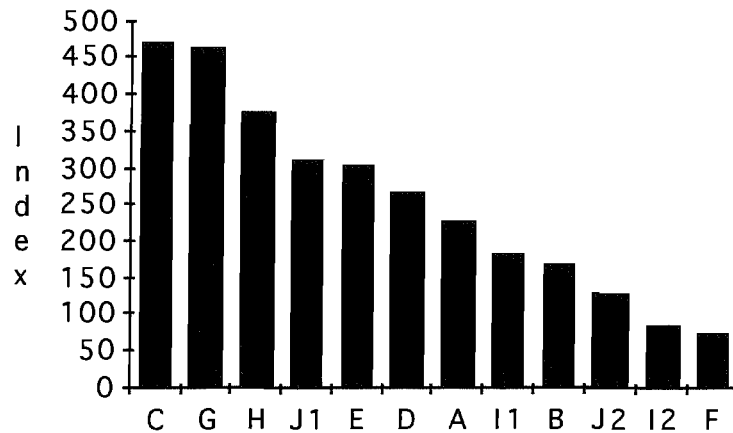
	Parents	Pupils
<b>Parents chose</b>	24	21
<b>Children chose</b>	7	18
<b>Parents chose but listened to child's views</b>	41	11
<b>Parents / children liked same school</b>	28	50

**Figure 7.13 The decision-makers in secondary school choice (percentages)**

Question 3 in both the parent and pupil questionnaire asked who had made the decision about secondary school choice, and the results are shown in Figure 7.13. While the data provides some interesting insights into the differences in perception about the decision-making process between parents and children (for example, 18% of pupils thought they chose, while only 7% of parents thought their children chose!), the key idea from the data is that of shared decision-making. We might regard the customer and decision-maker in this situation as a "composite consumer", a combination of parent and pupil, presumably in differing balance from family to family. This would suggest that a better indication of the importance of the different sources of information would be found in a combined index of parental and pupil views ie a combination of the indices in Figures 7.11a and b.

Figure 7.14 shows such a combined index. It has been calculated to give equal weighting to parental and pupil views. The parental index has been multiplied by 1.5 to take account of the smaller number of parent responses (104) compared to pupil responses (158). The graph shows the primacy of the prospectus / booklet and visits to the school in terms of information provision, with the open day the third most important source.

The graph confirms, therefore, the strong similarity between the perceived importance of the various sources of information from the schools' perspective and the reality of their importance to the 'composite consumer'. Two other important ideas also emerge, however. Firstly, the role of the media appears, at first sight, to have been overestimated by the schools, since it is the least important factor from the pupils and parents point of view. However, its role in a more subtle and less direct way in forming community opinion is not clear. Hence its importance as an indirect factor may be rather greater than the 'consumer' believes. Secondly, the role of pupil visits to feeder schools was seen as important in the 'expert survey' where the 50% of schools that used this method regarded it as very important. In the case study schools it was not a communication method used by the schools and it does not appear in the list of factors seen as important. This suggests that there may be



### Key

- A = Pupil's class teacher
- B = Primary school headteacher
- C = Booklet / prospectus
- D = Child's brothers / sisters
- E = Friends / colleagues
- F = Media
- G = Visit to the school
- H = Open day
- I1 = Parents (Pupils view)
- I2 = Other parents at the primary school (Parents view)
- J1 = Talk by teachers visiting primary school (Pupil view)
- J2 = Other parents at the secondary school (Parent view)
- K = Talk by teachers visiting primary school

**Index - see text for explanation**

**Figure 7.14 A combined index of parent and pupil information sources for school choice**

communication methods that might be exploited by schools whose importance and value has not yet been recognised.

## **7.6 Training and Staff Development for Marketing**

Within this study sub question 2.4 addresses the issue of staff development for marketing ie.....

**(SQ 2.4) Do those working in schools have an adequate understanding of their needs in this area ?**

Specifically, this question considers whether there is sufficient expertise in schools to engage with marketing at the operational level and whether there are specific training needs that can be identified. This may be informal "on-the-job" training or a more formal programme of staff development (eg Main (1985); Wideen and Andrews (1987)).

The headteacher interviews asked "What experience is there of training for marketing on the school staff?" (Question 10). In the interviews with the 'marketing managers' and the Chairs of Governors the interviewees were asked "What experience do you have of training for marketing?". From their responses a number of categories of training experience of the senior managers in school involved with marketing could be identified.....

- Industrial / commercial experience of marketing
- Attendance at a short in-service course on marketing, for example one day courses on marketing organised by The Industrial Society
- Reading books on marketing
- Attendance at an award-bearing long course which included a unit / course on marketing within it, for example within an MBA(Ed) or MA(Ed) course.
- No training of any sort

In terms of the staff development programme within the school, five categories could be identified:-

- One or more staff had attended a course on marketing
- One or more staff had addressed issues of marketing as part of a Masters course.
- At least one whole school INSET day had been used for a consideration of marketing
- Staff had undertaken an evaluation exercise, such as a SWOT Analysis.
- No staff development for marketing had occurred

Figure 7.15 shows the pattern of responses from the case study schools. Amongst the headteachers, five out of eight had attended a short course on school marketing, typically a one day course, while three had not engaged in any formal training. The 'marketing managers' had a wider range of training experiences, with three having attended short courses (in each case along with the headteacher of their school), and three having studied units on marketing within a masters level taught course. One had written a masters dissertation on a marketing topic. Two other 'marketing managers' had no experience of training. Amongst the Chairs of Governors, the only 'training' was the commercial and industrial experience of three of the interviewees. Of interest is the identification of one headteacher whose training included reading books on marketing. As an open response question this was an area of training not identified by others. It seems improbable that none of the other interviewees had done such reading !

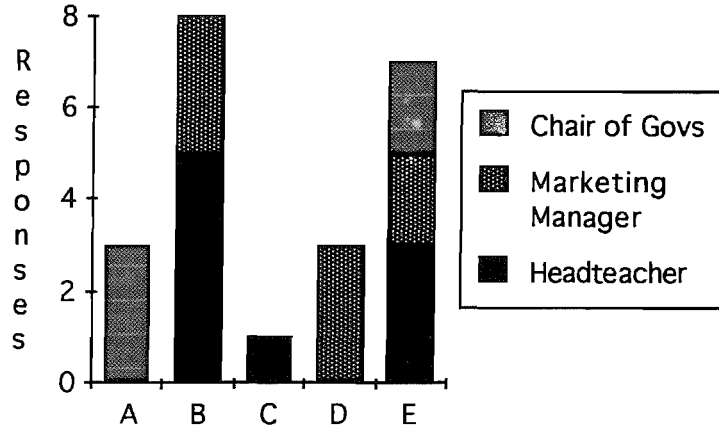
Figure 7.15b indicates that a staff development programme in the field of marketing is not common in the case study schools. In four of the schools no training of staff outside senior management had occurred at all, and in two others the development was linked to individual Masters courses undertaken by staff - the training in marketing was not planned by the school. Two schools had undertaken whole staff training, one with the use of a whole INSET day to undertake a SWOT Analysis, and the other with a SWOT Analysis but not with the use of a training day. It is clear that whole staff training is not a high priority in the field of marketing, a view supported by two of the headteachers.....

"There is no need for training in marketing as the techniques are so easy...and consultancies could offer nothing that schools cannot provide themselves"

(Headteacher, Downsview School)

"There is no training for staff because I do the marketing"

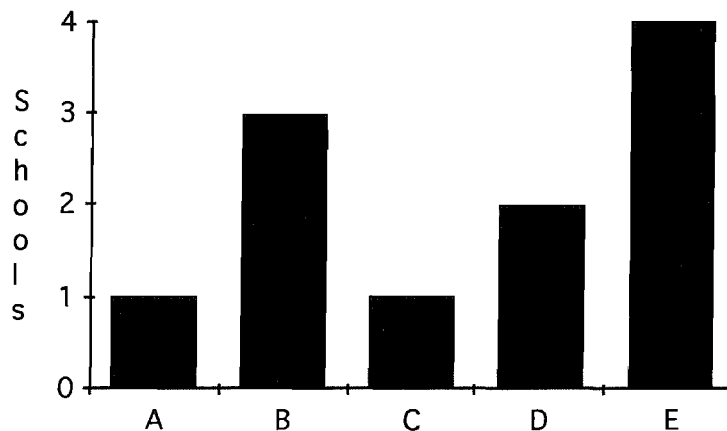
(Headteacher, Hillview School)



**Key**

- A = Industrial / commercial experience
- B = Attended short INSET course
- C = Read books on marketing
- D = Attended long course (eg MA(Ed))
- E = No training

**a) Training for marketing - the experiences of senior staff in the case study schools**



**Key**

- A = Some staff have attended a short INSET course
- B = Some staff have attended long courses inc marketing
- C = At least one whole school INSET day on marketing
- D = Use of evaluation tasks (eg SWOT) by staff
- E = No training

**b) Staff development for marketing in the case study schools**

**Figure 7.15 Marketing and staff development in the case study schools**

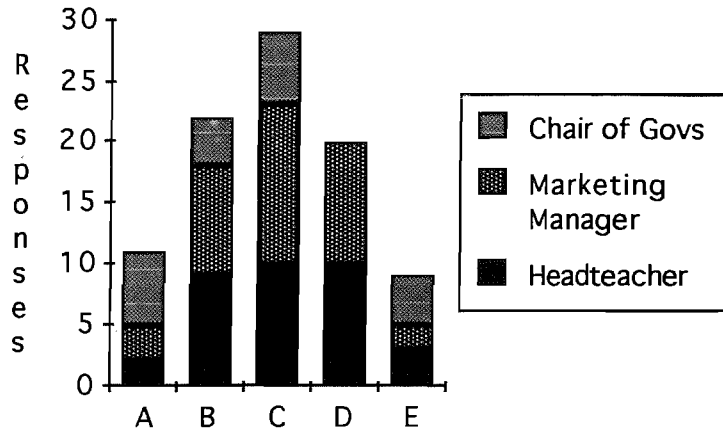


The 'expert survey' included two categorised response questions on training and staff development - Question 6 asked "What experience of training in the field of external relations and marketing do key staff have ?", and Question 7 asked "What staff development activities have been organised to support marketing in the school ?". Figure 7.16 shows the responses, and suggests two observations:-

- There is a range of training experience amongst senior staff involved with the marketing function. For "in-school" staff (ie excluding the Governors) the most utilised form of training is reading books and attendance at short (eg one day) courses on marketing. For Chairs of Governors, the most frequent training experience is industrial / commercial experience.
- Fifty percent of the headteachers (9 out of 18) and fifty percent of the 'marketing managers' had attended a short course on marketing.

Responses from the expert schools (Figure 7.16b) indicates, as with the case study schools, that there is a low level of staff development in the area of marketing. However, the range of staff development methods is wider than used by the case study schools. While 11 of the 18 schools indicate that staff have attended courses on marketing, only 6 (33%) reported the use of a staff INSET day for training and a similar number had undertaken an evaluative exercise with staff such as SWOT. Three aspects of staff development which had not been used by the case study schools were identified in the expert survey. These were the training of support staff in reception skills; the use of an external consultant to run sessions in school; and the use of departmental or pastoral group staff development time for focusing on marketing issues.

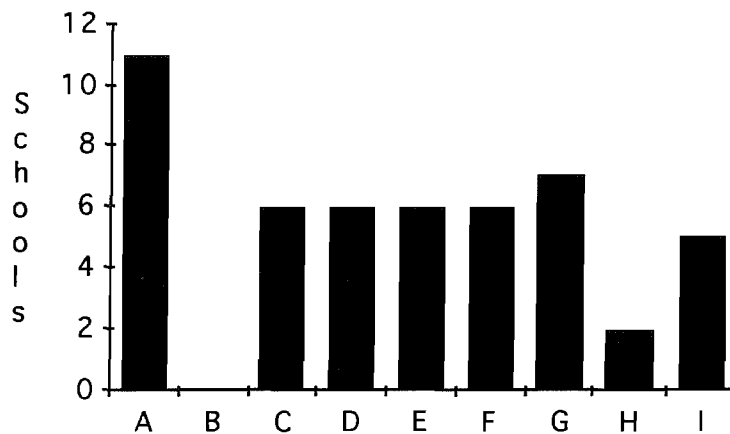
The data presented above indicates a paucity of staff development in this field. The 'need' for staff development is clearly a cost-benefit based qualitative judgment by senior staff considered in the context of scarce resource allocation. The staff sample survey investigated this perceived need for training in marketing. Question B3 asked what training they would find useful to enhance their effectiveness in this area, and Question B4 asked interviewees what training they had received for marketing.



**Key**

- A = Industrial / commercial experience
- B = Attended short INSET course
- C = Read books on marketing
- D = Attended long course (eg MA(Ed))
- E = No training

**a) Training for marketing - the experiences of senior staff in the expert survey schools**

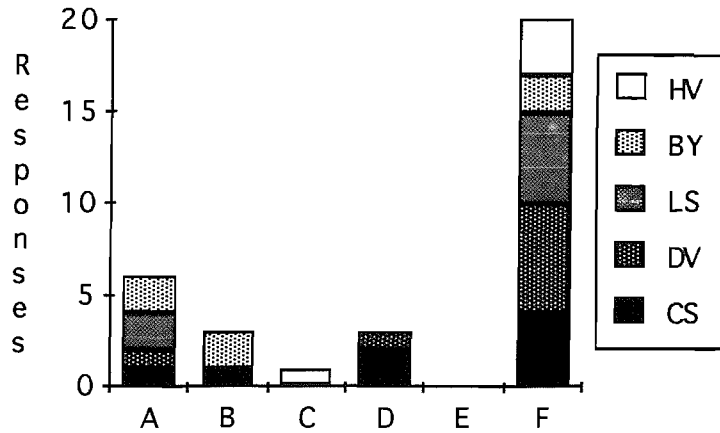


**Key**

- A = Some staff attended short INSET course
- B = Some staff have attended long courses inc marketing
- C = At least one whole school INSET day on marketing
- D = Use of evaluation tasks (eg SWOT) by staff
- E = Support staff training
- F = Training in-school by consultant
- G = Training in departments
- H = Others
- I = No training

**b) Staff development for marketing in the case study schools**

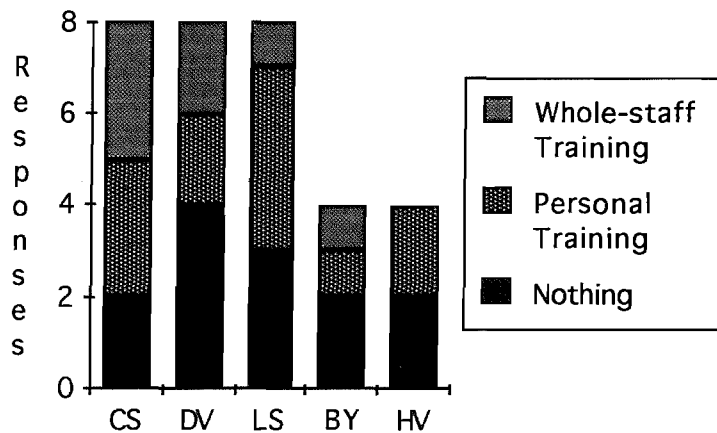
**Figure 7.16 Marketing and staff development in the expert survey schools**



**Key**

- A = Industrial / commercial experience
- B = Attended short INSET course
- C = Read books on marketing
- D = Attended long course (eg MA(Ed))
- E = School-based INSET
- F = No training

**a) Staff development for marketing - evidence from the staff sample in the case study schools**



**b) Training needs for marketing identified by staff in the case study schools**

**Key**

- CS = Castle School
- DV = Downsview School
- LS = The Lee School
- HV = Hillview School
- BY = Bycars School

**Figure 7.17 Marketing and staff development - evidence from the staff sample in the case study schools**

Figure 7.17 shows the responses to these questions. Figure 7.17a suggests an absence of staff development in this field, with 20 of the 33 interviewees indicating that they had received no training. The training experience of the other respondents was varied, with industrial / commercial experience being the most frequently cited, and a further six having attended a relevant short or long course. Of note is the 'nil' return against school-based INSET. In one of the case study schools the operation of a whole staff INSET day undertaking a SWOT Analysis was well documented, and yet the staff involved appeared not to have linked this to the development of marketing in the school.

Figure 7.17b indicates the staff expression of training needs. Twelve of the respondents (41%) indicated no need for training in the field of marketing, while 11 (38%) expressed a need for individual training / development, and 6 (21%) suggested that whole-staff training was necessary. This pattern appears consistent across the five case study schools where staff sample interviews were conducted.

Overall, it must be concluded that there is little staff development in the field of marketing, and only a limited recognition of its role by senior staff, despite a greater perception of need for it from a broad cross-section of staff. The most frequent forms of formal training are attendance at short courses by headteachers and 'marketing managers'. This would suggest a number of conclusions:-

- Marketing is regarded as something which senior staff 'do' - it is a managerial function for the main decision-takers in the school, and so staff training below this level is not necessary. There appears to be little perception that marketing might be integral to all that the school does at all levels.
- Marketing is perceived as a role that does not require substantial training. The skills and understanding can be picked up in a reactive way as the needs arise, for "the techniques of marketing are easy" (Headteacher, Downsview School).

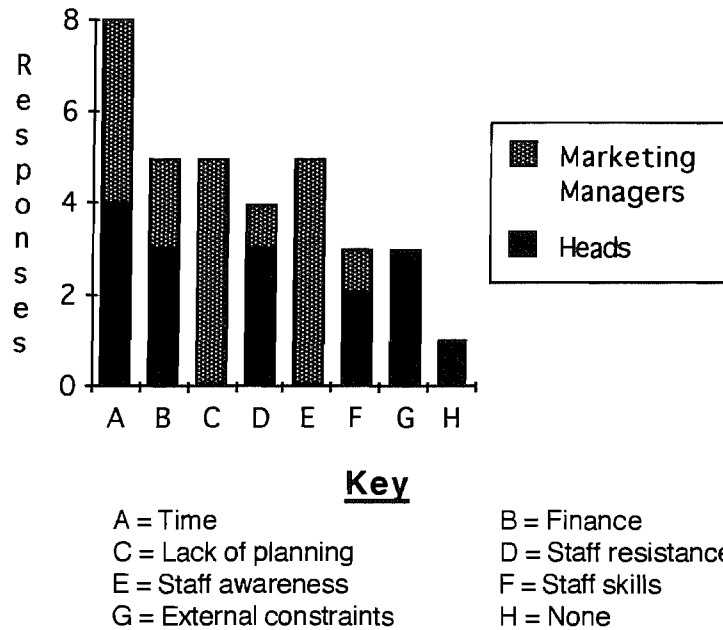
- Marketing is not a high priority for professional development. None of the schools had allocated funding to training for marketing, although the headteacher of Castle School had asked the school's marketing group to consider this issue.

## **7.7 Constraints in the System**

The existence of rational planning models has been questioned by many authors from both within education (eg Gray (1991); West-Burnham (1994)) and business (eg Peters and Waterman (1982)). Three key reasons for the lack of such planning are the resource constraints of time and finance; the lack of synchronisation of planning time scales and the time scales of changing external influences such as government policy; and the rapidity and complexity of change in modern organisations which makes integrated planning very difficult.

The evidence of this research study makes clear the absence of rational planning within the field of marketing, and implies a wider issue of reactive "planning" across the whole field of management within schools. The reasons for this were explored within the headteachers and 'marketing manager' interviews, where Question 11 asked "What are the current problems in developing a marketing strategy?". The constraints identified across the interviews were:-

- Insufficient time to undertake the necessary planning and implement strategies
- Insufficient finance to support marketing
- An absence of planning for marketing ie a managerial process deficiency
- Resistance by staff to the concept of marketing
- A lack of awareness by staff of the need for marketing
- Insufficient skills amongst staff to undertake effective marketing activities.
- Constraints imposed by the environment beyond the school, for example agreements between headteachers to limit promotional activity
- No constraints



**Figure 7.18 Constraints in the development of marketing strategies in the case study schools**

Figure 7.18 indicates the frequency with which these constraints were mentioned, and distinguishes between the perceptions of headteachers and the ‘marketing managers’. Only one interviewee (a headteacher) perceived that there were no constraints to the planning of marketing. The most frequently cited constraint was time, which half the headteachers and half of the marketing managers believed to be a problem :-

“ There is a danger of missing good publicity opportunities because of time pressures. We need a calendar of events, and we need to take advantage of the fact that we have the wife of the local paper editor on the staff. With a small staff we cannot find someone to coordinate the activity”

(Headteacher, Fenside School)

A constraint identified by most of the ‘marketing managers’ but by none of the headteachers was that of an absence of planning for marketing. This would suggest that the more intimate involvement of the

marketing managers in the field has demonstrated the need for policy and practice frameworks within which to operate.

A general field of constraints was related to the expertise, understanding and compliance of the staff. Half of the interviewees believed that resistance by staff to the idea of marketing was a problem, although the marketing managers placed more emphasis on a lack of staff awareness. This was clearly expressed by the headteacher of one of the Alcheston schools:-

“ There is some staff resistance, often political resistance. They see it as selling their souls, dishonesty or rubbing shoulders with the devil. But there is a general movement towards acceptance with a feeling that it needs to be done. Some of the newer staff are very enthusiastic, but the older staff show more resistance - although the greater resistance seems more linked to narrowness of experience than age”

(Headteacher, Downsview School)

Overall, it is clear that the management of marketing within the schools is recognised as operating within a constrained system which makes rational planning problematical. There is a good match between the perceptions of the ‘managers’ about this issue and the reality of the organisational systems that they operate, as identified throughout this chapter.

## **7.8 A Perspective on Marketing Strategies**

An overall perspective on the planning and implementation of marketing in the case study schools provides some insights into the key area of marketing strategy. Success in the market place is frequently deemed to be the result of the identification of a marketing strategy which enables the provider of the product or service to dominate that market (Kotler and Fox (1985)).

In broad terms an organisation can choose a broad strategy, in which it seeks to satisfy all or most segments of the market, or it can focus on a particular niche based on a specialised product or target market (Kotler and Fox (1985); Hanson and Henry (1992)). In secondary schools niche marketing is particularly problematical, because of the legislative demands in terms of curriculum, and the enrolment requirement that means schools must, within minor constraints, accept all pupils from within their catchment who apply to attend them. Murgatroyd and Morgan (1993) identify four strategies which schools can adopt:-

- A Broad, Open strategy in which the school does not focus on specific curriculum offerings or particular target market groups
- An Enhanced, Open strategy in which the school offers a broad, open approach but enhanced by specialist offerings eg in terms of sport, or other extra-curricular provision
- A Basic Niche strategy, in which the school seeks to develop special expertise or focus in particular areas, for example in special needs, or modern languages
- An Enhanced Niche strategy in which the school seeks to dominate, at a regional or national scale, with its expertise in a particular area eg technology, or drama.

The strategy of niche marketing has been emphasised by other writers. Ranson (1993) quotes Chubb and Moe (1989) in suggesting that...

“The key to better schools lies in....creating markets. Because markets also select and sort, if schools are to be successful they will need to find a niche - a specialised segment of the market to which they can appeal and attract support”

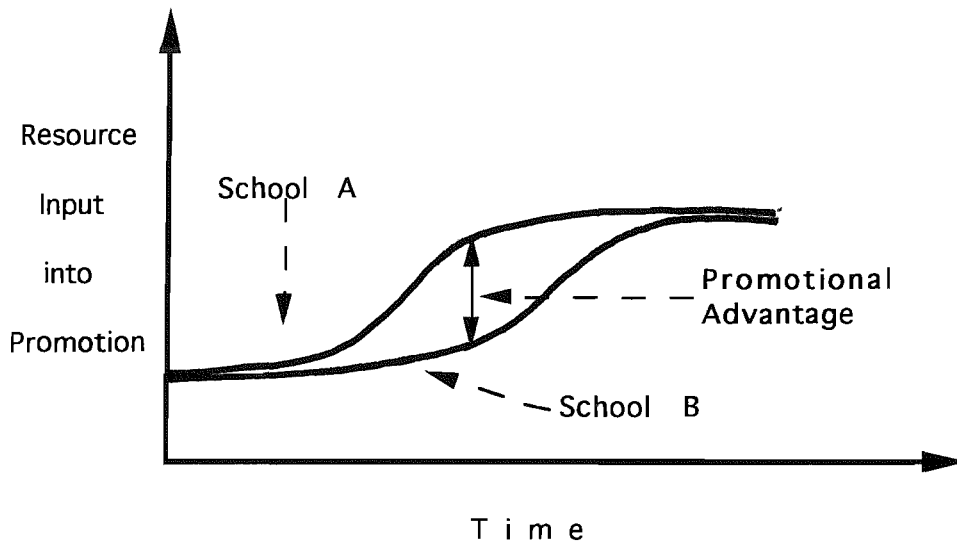
(Chubb and Moe (1989) quoted in Ranson (1993): 333)

The evidence from the case study schools, and also from the expert survey, suggests that such subtleties of strategic planning are not yet identifiable within the secondary school market place. Only at Hillview School was overt reference made to the idea of a market strategy, where



the headteacher indicated that “(our) niche is discipline, control and good uniform” (Headteacher, Hillview School). This in itself raises questions about the understanding of concepts such as ‘niche marketing’ within schools, for this description is not one of a ‘niche market’. Most of the schools have adopted by default an enhanced open strategy, but show little evidence of seeking to differentiate themselves from their neighbours. Indeed, within Alcheston, for example, there is evidence that the schools are seeking to emulate attractive features of their neighbours rather than distinguish themselves - all emphasise academic success, standards of dress and presentation with a shift towards uniforms, and a good range of extra-curricular experience. Hence there appears to be a pressure to remove real choice from parents rather than to extend it.

An important prospective issue may be seen to emerge from this. Differentiation appears not to be the route pursued by schools, and advantage in the market, and hence economic gain, is being pursued through promotional strategies. Without differentiation such a strategy is liable to lead to short term gains, but, in the long term, only to inflation in promotional costs for little real gain. Figure 7.19 shows this process in graphical form. Both School A and School B start with similar levels of input into promotional activity. School A then pursues an active promotional strategy and invests resources (time and finance) into promotion. This may well result in enhanced pupil recruitment which is indicated by the promotional advantage marked on the graph. School B will respond to the promotional strategy of School A by seeking to recoup some of its “market share” by developing its own promotional strategy. If both schools are pursuing the same broad market strategy, perhaps an open enhanced strategy, then School B may close the gap in recruitment on School A. At the end of the observed time period both schools will have returned towards the original status quo, but with both investing higher levels of resource into the promotional process. School A’s gains will be in terms of the bulge of recruitment during the period when its promotion provided a competitive advantage for it. This suggests that where differentiation between schools is not present or only limited in extent, schools can only gain in the long term from a competitive strategy if they



**Figure 7.19 Inflation and the promotional process**

are the only school to adopt such an approach. If all schools adopt such a strategy then the net result is only inflation in promotional and marketing costs.

Two further facets of this idea can be identified. Firstly, the time lag between one school adopting an aggressive promotional strategy and its neighbour following suit may well be dictated by the annual recruitment cycle, and be a minimum of one year. It is possible that a school in a precarious financial and recruitment situation may find that one year of being outplayed by a competitor is enough to set it into a spiral of decline from which it cannot recover. Secondly, the inflated costs of competition may in the short term be to the benefit of all players in the market place by forcing schools to reflect carefully on the quality of their external communications and promotional materials. In this dimension the market may enhance quality through competition.

## 7.9 Summary

This chapter has considered the key question...

**(KQ 2) What have decision-makers in schools, whether they be headteachers, governors or classroom teachers, done to modify the organisation of the school's management in response to pressures towards marketisation ?**

The evidence base is wide ranging from within the case study schools and also from the 'expert survey', and has enabled a number of specific conclusions to be reached:-

- The management of marketing occupies little time in comparison to other management tasks, although there is a recognition amongst schools that it ought to occupy more time than it does. The time allocated to marketing is seen to be increasing.
- A range of organisational structures exist for the management of marketing, but an SMT Model in which planning and organisation is undertaken by the Senior Management Team is the most usual. There is little consultation between SMT and the rest of the staff, and in only a few cases is there a "marketing group or committee" in place.
- The role of the governing body is limited in the management of marketing in most of the schools studied.
- Few schools have marketing plans, either as separate documents or as part of a school development plan
- The planning process for marketing is informal, reactive and non-rational in nature in most of the schools studied, and bears little resemblance to the formal planning processes identified in the literature. There is an absence of key elements of a formal process in some schools (for example marketing research) and the links and feedbacks between the processes

are poorly developed.

- Little marketing research is undertaken in the case study schools, while half of the 'expert survey' schools undertake some form of marketing research, with some innovative approaches being developed for resource constrained systems.
- Some processes of evaluation are in place and their occurrence and range is increasing, but this is rarely formalised into pro-active evaluation systems within the case study schools.
- The budget for marketing is normally held and managed by the headteacher. In the case study schools the financing of marketing is ad hoc and reactive, either using a global sum identified within the budget (Method A) or in a totally responsive approach as expenditure needs arise (Method B). In the 'expert' schools these two methods are common as is Method C which links expenditure and budgeting to the aims of the marketing plan or the school development plan.
- The promotional strategies and tactics used are mainly those which are an extension of pre-existing practice, for example open days. The 'expert' schools have developed some strategies which are new to schools, for example the use of visits to feeder schools by pupils.
- Promotional strategies may be seen to be of short-term or long-term recruitment value, and five key strategies emerge as important for both - the prospectus for parents; open days; visits to feeder schools by staff; the encouragement of visits by prospective parents; and visits to feeder schools by pupils.
- The decision of school choice is normally a joint parent / pupil decision, and the concept of the 'composite consumer' may be identified.
- Approximately 60% of parental choice is developed from information flow directly under the control of the schools. The other 40% derives from

'community general knowledge', which may be seen to be the product of 'word-of-mouth' processes.

- The factors which are deemed to be important information sources by the 'composite consumer' are broadly the same as those deemed to be important by the schools.
- Staff development for marketing is generally confined to senior staff, and consists principally of attendance at short (one day) courses by the headteacher and the 'marketing manager'.
- There is a perceived need by staff for marketing training.
- The pattern of training indicates that marketing is perceived as something which 'senior staff' do, which requires little training and which is not a high priority in terms of staff development.
- Important constraints in the marketisation of schools are identified by headteachers as a lack of time and finance, staff resistance and external constraints. The main constraints identified by 'marketing managers' are a lack of planning and a lack of staff awareness.
- Few schools have clearly articulated marketing strategies. Most seek market advantage by promotion rather than differentiation, and this may stimulate an inflationary process in terms of promotional costs.

# **CHAPTER 8**

**Results / Analysis 3 - A Developing Market Culture in  
Schools ?**

## Chapter 8

### Results / Analysis 3 - A Developing Marketing Culture in Schools?

#### 8.1 Introduction

Chapter 8 provides a wider perspective on marketing in secondary schools by examining the development of a marketing culture addressed in Key Question 3. It builds directly from KQ1 and KQ2 and is in many respects an integral sum of the insights they provide. Its central theme is the culture of the case study schools, and it asks.....

**(KQ3) How far has a marketing culture developed within secondary schools as a result of the marketisation of education ?**

The injection of market theory, with its emphasis on client-centred schools and parental choice should lead to a number of notable changes in the culture of schools if policy makers are to deem that these concepts have been successfully assimilated. The changes driven by legislation are a means of re-orienting the professional culture of education towards a philosophy in keeping with market-driven ideologies, and this should be identifiable in the internal relationships within schools and the priorities accorded to existing practices and new processes.

In Chapter 2 the nature of a marketing culture within a service-based institution was considered with reference to the work of Cowell (1984), who suggests that a marketing culture has four principal components.....

- An attitude of mind which is found throughout the employees of the whole organisation in which the needs of the customer are the prime concern and which drive the planning, organisation and functioning of the organisation.

- An organisational system for planning and operation which reflects the development of a market focus.
- The use of a range of promotional tools to communicate effectively with the customer.
- The use of a range of analytical techniques to interpret, understand and enable effective response to the market and client needs and wants (eg SWOT Analysis, PEST Analysis).

This chapter will consider each of the case study schools against these components, and will seek to draw out a number of generalisations about the development of a marketing culture in schools.

## **8.2 Criteria for Evaluating the Case Study Schools Against Cowell's Dimensions**

The nature of the case study approach used within the schools in Alcheston, Manport and Norbridgeshire means that a wide range of views and ideas has been identified in relation to specific aspects of marketing, both in terms of understanding of the concept and in terms of the processes of planning and implementation of marketing. From this analysis it is possible to make qualitative judgments about the development of a marketing culture in each of the schools, using the approach outlined below.

For each component of Cowell's model of marketing culture, each of the case study schools was considered in relation to three levels of development:-

- **Strongly Developed** ie this component is strongly represented in the school
- **Moderately Developed** ie this component is present and has been developed to some noticeable extent in the school



• **Weakly Developed** ie this component is weakly present or is absent from the school.

To enable such a categorisation to be made a set of criteria for classification of the schools was established, as indicated in Figure 8.1. Each broad group contains a number of strands which are considered in each of the three levels of development. For example, "Attitude of Mind" (Characteristic A) is judged in relation to:- (1) the understanding of senior staff; (2) the understanding of other staff; (3) the view that is held of the development of marketing; (4) communication within the staff on marketing policy and practice; (5) the existence of a shared view of marketing aims; and (6) and the development of a staff training and INSET programme in relation to marketing. Each strand is described for the Strongly Developed (S) level, the Moderately Developed (M) level, and for the Weakly Developed (W) level. These are coded as indicated, for ease of cross reference and to enable profile diagrams (see Figure 8.2) to be constructed.

The analysis below considers each of the case study schools in relation to the criteria outlined in Figure 8.1.

## **8.3 Marketing Culture in the Case Study Schools - An Analysis**

### **8.3.1 Castle School, Alcheston**

The 'attitude of mind' within Castle School towards marketing may be seen as moderately developed in terms of the understanding demonstrated by both senior staff and the cross-section of their colleagues interviewed. Although both groups have a clear understanding that marketing has a number of component activities (Figure 6.5a), there is little recognition of marketing as a focusing of the school's activities on the 'customer'. Most of the senior staff and nearly half the staff sample regard marketing as 'selling' the school to potential pupils' parents. Across the staff there is a generally positive view of the place of marketing within the school, with three (out of eight) indicating that they are happy with the

<u>Characteristic</u>	<u>Criteria</u>
<b>A. Attitude of Mind</b>	
<b>Strongly Developed</b>	<ul style="list-style-type: none"> <li>1• Senior Staff have a sophisticated understanding of the concept of marketing</li> <li>2• Most other staff have a sophisticated understanding of the concept of marketing</li> <li>3• There is a positive view of the place of marketing within the school from most staff</li> <li>4• Senior and other staff communicate and consult on marketing policy and practice</li> <li>5• There is a shared view of the school's aims and purpose of marketing across the staff</li> <li>6• Staff training and development for marketing related activities is well-developed</li> </ul>
<b>Moderately Developed</b>	<ul style="list-style-type: none"> <li>1• Senior Staff have some understanding of the concept of marketing</li> <li>2• Some other staff have some understanding of marketing, but many do not</li> <li>3• There is a positive view amongst some staff of the place of marketing in the school</li> <li>4• Senior and other staff communicate / consult with each other on marketing policy and practice to only a limited degree</li> <li>5• There is little shared view of the school's aims /purposes in marketing across the staff</li> <li>6• Staff training and development for marketing is poorly-developed and may be absent</li> </ul>
<b>Weakly Developed</b>	<ul style="list-style-type: none"> <li>1• Senior Staff have little or no understanding of the concept of marketing</li> <li>2• Other staff have little or no understanding of the concept of marketing.</li> <li>3• There is a generally negative view of marketing amongst the school staff</li> <li>4• Senior and other staff rarely or never communicate and consult on marketing policy.</li> <li>5• There is no shared view of the school's aims and purposes in marketing across the staff</li> <li>6• Staff training and development for marketing related activities is absent</li> </ul>

(Continued.....)

**Figure 8.1 Criteria for a Classification of the Marketing Culture in School (1)**

(.....Continued)

<u>Characteristic</u>	<u>Criteria</u>
<b>B. Organisational System</b>	
<b>Strongly Developed</b>	<ul style="list-style-type: none"><li>1• A clear system of responsibility and decision-making exists for the marketing function</li><li>2• A Marketing Plan exists either separately or within the SDP and is integrated into whole school planning</li><li>3• A budgetary system exists that links spending on marketing to pre-determined aims</li><li>4• A formal evaluation system exists for marketing</li></ul>
<b>Moderately Developed</b>	<ul style="list-style-type: none"><li>1• A system of responsibility and decision-making has been established for at least some elements of marketing</li><li>2• Some planning for marketing exists either separately or within the SDP which is not necessarily termed marketing.</li><li>3• A budgetary system exists that enables planned spending on marketing.</li><li>4• Only limited formal evaluation is undertaken in relation to marketing</li></ul>
<b>Weakly Developed</b>	<ul style="list-style-type: none"><li>1• Marketing activities are arranged in an uncoordinated, ad hoc manner</li><li>2• No plan for marketing exists either separately or within the SDP</li><li>3• The financing of marketing is ad hoc</li><li>4• Little or no evaluation of marketing takes place</li></ul>
<b>C. Promotional Tools</b>	
<b>Strongly Developed</b>	<ul style="list-style-type: none"><li>1• A wide range of promotional methods is used, which includes both traditional communication systems (eg Open Days) and innovative approaches (eg pupil visits to feeder schools).</li><li>2•The promotional purpose of each method used is explicit</li><li>3•Evaluation of the effectiveness of strategies is undertaken</li></ul>
<b>Moderately Developed</b>	<ul style="list-style-type: none"><li>1• A range of promotional methods is used, mainly using traditional communication systems (eg Open Days) .</li><li>2•The promotional purpose of each method used is clear to senior managers</li><li>3•Little evaluation of different strategies is undertaken</li></ul>
<b>Weakly Developed</b>	<ul style="list-style-type: none"><li>1• Few or no promotional methods are used beyond legal obligations</li><li>2• Methods used are not linked to promotional objectives</li><li>3• No evaluation of the effectiveness of different methods is undertaken</li></ul>

(Continued.....)

**Figure 8.1 Criteria for a Classification of the Marketing Culture in School (2)**

(.....Continued)

<u>Characteristic</u>	<u>Criteria</u>
<b>D. Analytical Tools</b>	
<b>Strongly Developed</b>	<ul style="list-style-type: none"><li>1• The school has a good awareness of its external marketing environment as a result of using appropriate analytical techniques / marketing research</li><li>2• The school has a good awareness of its internal strengths and limitations in relation to marketing as a result of using appropriate analytical techniques</li><li>3• Planning and implementation of marketing is strongly linked to marketing research</li></ul>
<b>Moderately Developed</b>	<ul style="list-style-type: none"><li>1• The school has used some analytical techniques to consider its external environment.</li><li>2• The school has used some analytical techniques to consider its internal strengths and limitations</li><li>3• Planning and implementation of marketing is linked to some degree to marketing research</li></ul>
<b>Weakly Developed</b>	<ul style="list-style-type: none"><li>1• The school has used no analytical techniques to consider its external environment</li><li>2• The school has used no analytical techniques to consider its internal strengths and limitations</li><li>3• Planning and implementation of marketing is not linked to marketing research</li></ul>

**Figure 8.1 Criteria for a Classification of the Marketing Culture in School (3)**

concept and only one expressing strong reservations. Three staff were happy with the idea of marketing, providing it does not involve strong competition between schools. Amongst senior staff the headteacher showed the strongest resistance to the concept, while the deputy headteacher (marketing manager) and the Chair of Governors were strongly in favour:-

“It (marketing) is absolutely inevitable, and quite right. We need to look for excellence, and marketing can highlight this or identify areas of need”

(Chair of Governors, Castle School)

However, there is little sharing of the school's aims in marketing across the staff, and a concern over a lack of communication and discussion about them. The Marketing Working Group is moving towards counteracting this view. There would appear to be only a limited amount of whole staff development in the field, although in comparison with other Alceston schools Castle School has been more active in this area. The headteacher and 'marketing manager' have both attended a short course, and a whole staff development day was allocated to a SWOT Analysis.

In terms of the organisational system, Castle School has a Marketing Working Group that reports to the SMT, where decisions are made, corresponding to the Type 4 Advisory Committee Model (Figure 7.1). This committee operates in a vague policy framework, however, for the school has no Marketing Plan and marketing "is hidden within the School Development Plan" (Deputy headteacher, Castle School). Although one of the briefs of this Working Group is the proposal of policy to the SMT, there are no plans to develop a separate marketing section within the SDP. Finance is planned in relation to items of marketing within the SDP (eg the prospectus), but beyond this is allotted on an ad hoc basis. Only limited evaluation is undertaken, and this is mainly of an informal reactive nature. Overall, the organisational system might be regarded as moderately developed.

A range of promotional methods is used by Castle School, which build on traditional communication methods. Emphasis is placed on inviting parents of prospective pupils to visit the school, which the headteacher regards as "costly on time, but very valuable", and on the role of the open evening for parents of Year 6 pupils. This has been the target of careful planning, with the press invited to attend, all pupils from feeder primary schools invited and a press advertisement to attract in pupils from 'out-of-catchment'. The prospectus has been re-designed, and is seen as underpinning all other activities. In the last two years this has been distributed to all pupils in the school, and is seen as more than simply for short-term recruitment purposes. The promotional purpose of each strategy has been identified by SMT and the Working Group, but little evaluation of

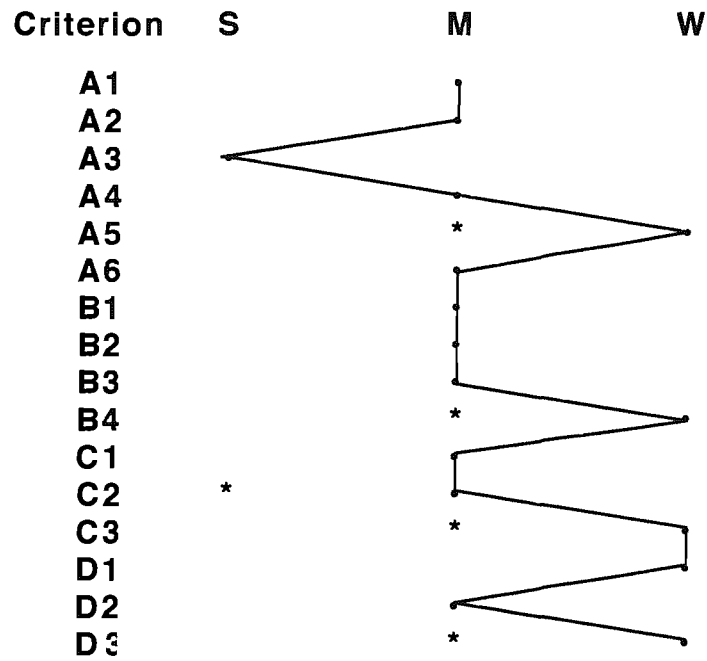
their effectiveness has been undertaken. The use of promotional tools might be seen, therefore, as moderately developed.

The school has not engaged in marketing analysis in any significant way. Its understanding of the external environment is intuitive and subjective, and its understanding of the internal environment is based on its SWOT Analysis. There is no real attempt to link the planning of strategy to a programme of marketing research. In this dimension, therefore, Castle School must be regarded as weakly developed.

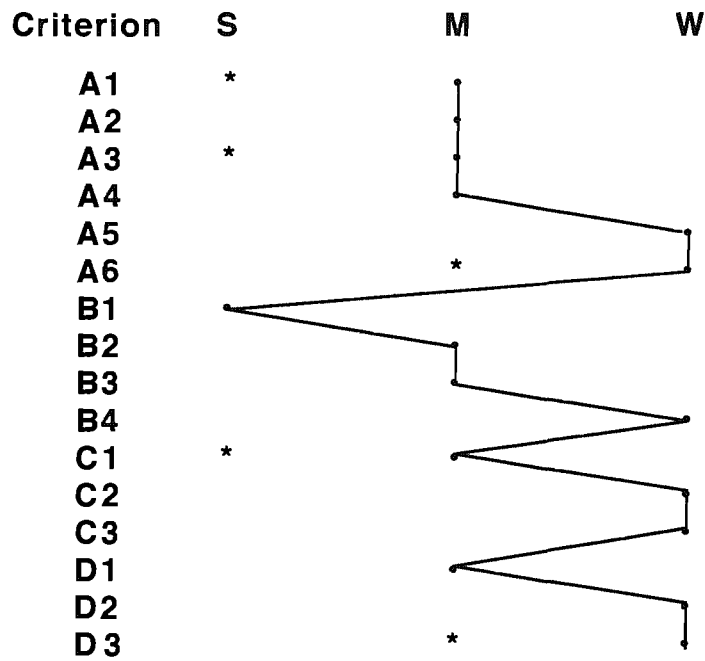
Figure 8.2a shows a development profile of Castle School in relation to the criteria in Figure 8.1. This would suggest that, overall, the school is moderately developed in terms of the integration of marketing into its organisation and culture. Its strongest element lies in the positive view of staff to the place of marketing in the school, and its area of poorest development lies in the application of analytical tools and the development of marketing research.

The development of culture and the implementation of change is clearly a dynamic process, and the image presented in Figure 8.2a is simply a snapshot view of the school. The final interview with the headteacher at the end of the research programme was designed to gain some indication of change over the previous eighteen months. This final interview demonstrated a number of important changes, including:-

- the importance of marketing and its key role in the school's life was increasingly recognised - "it underpins everything we do" (Headteacher)
- evaluation of the way in which enquiries from prospective parents are dealt with was occurring, and the use of the press and media was being reviewed
- some marketing research in the form of questionnaires to parents was being planned
- data on the school origins of entrants and enquirers was now being collected for marketing research purposes



a) Castle School



b) Downsview School

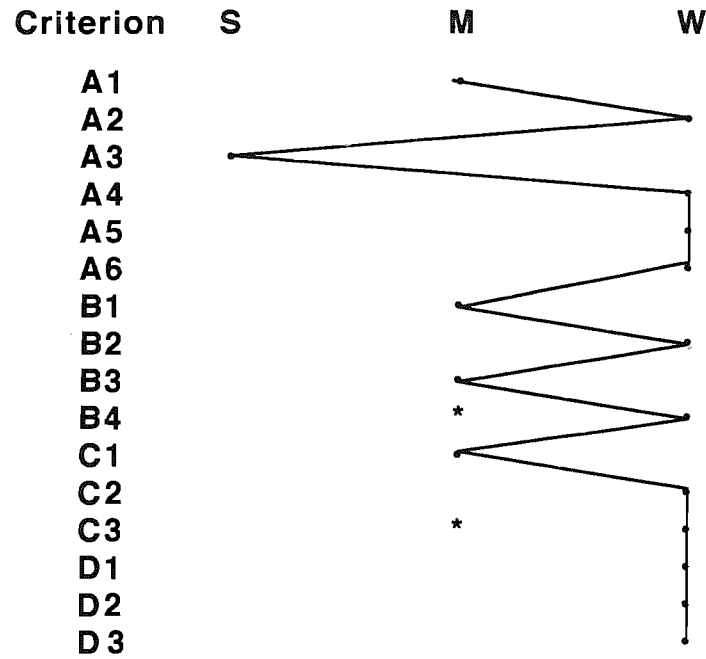
**Key**

- Position during initial analysis
- \* Estimated current position

(Continued.....)

Figure 8.2 Marketing cultural development at Alcheston case study schools (1)

(.....Continued)



### c) The Lee School

#### Key

- Position during initial analysis
- \* Estimated current position

**Figure 8.2 Marketing cultural development at Alchестon case study schools (2)**

The asterisks on Figure 8.2a indicate the apparent new position of the school on criteria where it has changed position in the light of the final headteacher's interview. This is inevitably subjective since it was not possible at this stage to cross-reference the ideas of the head with other staff. However, it gives some impression of the direction of change in the adoption of a marketing culture in the school.

### 8.3.2 Downsvew School, Alchестon

Downsvew School has a greater diversity of understanding of the key concepts in marketing amongst its senior staff than Castle School. The



deputy headteacher, who has assumed responsibility for all aspects of external relations since her appointment in 1993, has a well-developed understanding of the key concepts, and is one of only four of the fifteen senior staff interviewed in the case study schools with a clear view of marketing as responding to customer needs and wants - the only respondent amongst Alcheston senior staff with such a view. This view is shared by the chair of governors who is aware of some of the key differences, yet the headteacher regards all the terminology of marketing as meaning the same thing, a view of marketing as 'selling' plus good external communications about the school. Amongst the cross-section of staff all are aware of a distinction between different facets of marketing, but only two out of eight interviewed have a customer-focused view of marketing.

The attitude towards marketing shows some difference, however, between senior staff and the rest of the staff team. Senior staff have a positive view of marketing, with both the 'marketing manager' and the Chair of Governors supporting the concept, and with the headteacher expressing support for the enhanced communication dimension but some concern for the competitive element of marketing. The sample of staff shares these two perspectives in general, although three of the interviewees were entirely opposed to the ingress of the marketing concept into education. Communication between senior staff and other staff in terms of the development of marketing policy was seen as limited by most staff, although five of the eight staff interviewed saw their role in marketing as of some or considerable importance (Figure 7.5). As with Castle School there was little evidence of shared aims and objectives for marketing. No formal training had taken place in this area of practice, although the deputy headteacher had undertaken an MA (Ed) dissertation on marketing, and a colleague at head of department level had studied a marketing unit as part of his MA(Ed).

Overall, therefore, in terms of attitude of mind Downsview School might be seen to be moderately developed. The deputy headteacher summarised this state of development:-

“ My views have developed as a parent and this has modified a former purist educational view. (...) We need to recognise that marketing is everybody’s responsibility (but).... staff haven’t appreciated the ramifications and the need for marketing - there is some complacency”

(Deputy headteacher, Downsview School)

In terms of the organisational system, Downsview must be seen as ‘moderately developed’, although this represents a balance between some aspects of organisation which are strongly developed, for example in terms of a system of responsibility and decision-making, and other facets which are poorly-developed, for example evaluation. Downsview has adopted a structure that matches the Senior Marketing Manager model (Figure 7.1), with the deputy headteacher assuming the role of marketing manager. Marketing is a high profile issue within the school development plan, but does not exist as a separate heading. It may be seen, therefore, that marketing is integrated into whole school planning, and this is disseminated downwards to heads of department and pastoral heads who have some responsibility within their job descriptions for managing the external relations dimensions of their areas of responsibility. The budget is held by the headteacher. A separate budget code is identified as ‘Public Relations’, but this covers only the production of the prospectus and is calculated on a historical funding basis. All other expenditure is ad hoc, and so the funding method used would be classified as Type A (Figure 7.7). Evaluation and marketing research have not been undertaken in a formal way, although the School Association has collated some data on parental views of the school, and Downsview has an arrangement to share information with Eastville School from the application forms of pupils swapping catchment between the two schools. The head expresses some concern about the value of marketing research.....

“We might use a questionnaire to parents later in the year, but I’m not sure about this. It might ask about impressions and presentation, but there is a danger it may generate expectancy of

change and raise issues”

(Headteacher, Downsview School)

In the sphere of promotional tools, the school uses a range of approaches which build on traditional ‘educational good practice’. The prospectus is the key tool that is used, and has been developed from an original design by one of the science teachers, through a re-working of the idea by the headteacher and a specially-created governors working group. It is an area...

“...where no savings will be made, despite financial difficulties, (for) most Governors appreciate that the benefits of the prospectus exceed its costs”

(Headteacher, Downsview School (Interview 1))

A number of innovations are also being tried in other areas. A video produced by a parent, using a script developed by the Head of English and a number of pupils (but edited by the headteacher) was produced in 1991. Plans to produce an updated version that is “more controlled” (Headteacher) have been discussed by the SMT, but have not yet been developed beyond the planning stage. The traditional system of open evenings has been extended to include an open day in which parents can visit the school in session, sit in on classes and talk to pupils and teachers. The headteacher deemed this to be successful, with about 50% of pupil applicants having at least one parent attend. However, no formal evaluation of their views about the event had been obtained.

A characteristic of each of the school’s events is the top-down planning and management that drives it. Although departmental heads are given roles and responsibilities they are not involved in the overall strategy and planning, and there is no evidence that the aims of events are discussed and developed within the whole staff team. Little evaluation of events is undertaken. As with the other dimensions of marketing, therefore, the use of promotional tools must be regarded as ‘moderately developed’.

In the use of analytical tools Downsview School must be regarded as 'poorly-developed', for it has undertaken only a limited amount of ad hoc research, in conjunction with the School Association and Eastville School. Its views of its own strengths and weaknesses both in terms of internal processes and in terms of the external environment are entirely internally-generated.

By the time of the final interview with the headteacher some developments had occurred. The head's organisational structure, developed after his own appointment and brought to fruition with the deputy headteacher's appointment, was still the basis of planning. Little further innovation in strategies had occurred, and the budget for 'public relations' had not increased, although other budgetary areas had done so. The headteacher described the previous eighteen months as a period of "consolidation and refinement", although he perceived progress in a number of ways. In particular he believed that the staff view of marketing had become more positive as " they accept the inevitability of having to do some, and as they link it to their own job"

Other developments were seen in terms of "being tighter on organisation of, for example, the open day", and in the recognition that "one of the best marketing strategies is getting it right day to day" (Headteacher). This latter comment might be seen as an important development in thinking about marketing, for it suggests a focus on quality issues and the movement of the headteacher's understanding of marketing. The involvement and awareness of staff is seen, too, through the requirement for departments to produce their own leaflets about departmental programmes and activities, and through a staff development programme for middle managers, run by senior management, on the presentation of ideas to parents.

Responsiveness to the market is also increasing. Data collection on visits by parents and feeder school origins has been formalised, and the key thrust of the school's external image has been focused on an attempt to overcome a perceived external image of "mixed ability mediocrity"

(Headteacher, Downsview School). The publicity is emphasising the school's achievement of a high proportion of 'starred grade A's' at GCSE , which is higher than the figures for the neighbouring schools in Alcheston. A recognition of the loss of pupils to the private sector has lead to a joint advertisement with the other Alcheston schools aimed to persuade parents to use the state schools in the town.

Although these changes have not been cross-referenced, they are demonstrated in Figure 8.2, which shows the profile of Downsview School in terms of the development of a marketing culture.

### **8.3.3 The Lee School, Winsford**

Figure 8.2c shows the profile of the developing marketing culture at Lee School, Winsford, and suggests that of the three Alcheston schools it represents the least well developed culture.

In the sphere of "attitude of mind" both the senior managers and the sample of staff surveyed show a poor understanding of the nature of marketing and the distinctions between the key terminologies used. The headteacher had no real understanding of marketing, with the head regarding it as 'selling' , while the marketing manager and the Chair of Governors perceived it as 'selling plus wider communications'. The staff from the sample survey showed little or no understanding of the terms 'external relations' and 'public relations', and perceived marketing as 'selling' (4 out of 7 interviewed) or as 'selling and telling' (3 out of 7). This represents a consistency of view, however, which suggests that this is the perceived view of marketing disseminated throughout the school's culture, and may represent shared misunderstanding. This latter view is supported by the positive view from across the staff and senior managers towards marketing. Four of the seven staff interviewed were happy with the idea of marketing in schools, and only one expressed opposition. In terms of communication between senior staff and the rest of the staff there is a strong view that there is little or no consultation and discussion of marketing practice and policy in any of the possible communication fora

that exist within the school. Hence, there is no evidence of a shared view of the school's aims and purposes in its marketing activity. Staff training in this area has not been well-developed. The only formal planned training has been the integration of 'front-of-house' skills into the training of office staff, and the experience of the headteacher, who has attended conference sessions on marketing, and one of the school's pastoral heads who took a 'marketing' unit as part of an MA(Ed). In the broad area of 'attitude of mind', therefore, the school must be regarded as 'weakly-developed'.

The organisation for marketing is structured around the Senior Management Team, and accords with the SMT model (Figure 7.1). Alongside this, the role of the governing body is in the form of the Governors' Sub-Committee Model (Figure 7.2), although the existence and operation of this sub-committee has been transient. There has been a changing allocation of responsibilities for marketing, with the deputy with greatest responsibility holding only the brief for media and press links, and for publications. Other roles are allocated on an ad hoc basis as necessary. Planning is undertaken in the absence of both a fully-developed school development plan, and a marketing plan. At the first interview with the headteacher there were plans explained for both a final SDP and a marketing plan, but neither had appeared by the head's retirement in December 1993.

Financial planning for marketing at The Lee School accords with the Type A model developed in Chapter 7, with the allocation of some budget to specific items, but most of the expenditure being ad hoc, under the headteacher's control. The INSET budget, which could be used for appropriate training was delegated to the pastoral deputy headteacher, but the existing INSET programme contained no provision for marketing training. Evaluation and marketing research were largely absent. The headteacher, when asked what marketing research and evaluation is undertaken replied...

"None. There is some ad hoc data collection, for example gossip from teachers and responses to adverts, but there is no real need

for it - common sense tells us what we need to know”

(Headteacher, The Lee School)

The organisational system at The Lee School, therefore, must be regarded overall as moderately developed, although in some areas, such as evaluation, it is clearly weakly-developed.

In the area of promotional tools the school is ‘moderately developed’. The emphasis is on strategies which focus on the children and on the effect of word-of mouth. This represents some understanding of the role of quality and communications within marketing, yet this was not expressed overtly at any level within the school. The deputy headteacher suggested that...

“We need to explore the students’ idea of what the school is so we can base our marketing in the pupils and gain a sense of the school’s identity - the school doesn’t have one at the moment”

(Deputy headteacher, The Lee School)

The strategy has built strongly on traditional educational communication activities, and both the headteacher and the deputy headteacher stress the role of primary school visits by staff and the re-design of the prospectus. There is little evidence in the school, however, of reflection upon the role and effectiveness of the strategies used, and no real evaluation has been undertaken. In the area of the new prospectus the headteacher believed that ...

“It went well - one parent asked “Is this an LEA school?””

(Headteacher, The Lee School)

This narrow perception of success was countered by the new headteacher in 1994 who believed that the prospectus was poor in design and quality.

In the fourth dimension of the use of analytical tools The Lee School is weakly developed. The school has undertaken no formal review

of its own marketing environment, nor has it considered the internal strengths and weaknesses of its operation in this field. The deputy headteacher with responsibility for publications and media links was aware of the lack of development in this area and the need for review. She believed that.....

“The most important task is to influence the Head and SMT about the need to manage the image of the school. I want to produce a marketing plan and talk to the governors, but this will take time”

(Deputy headteacher, The Lee School)

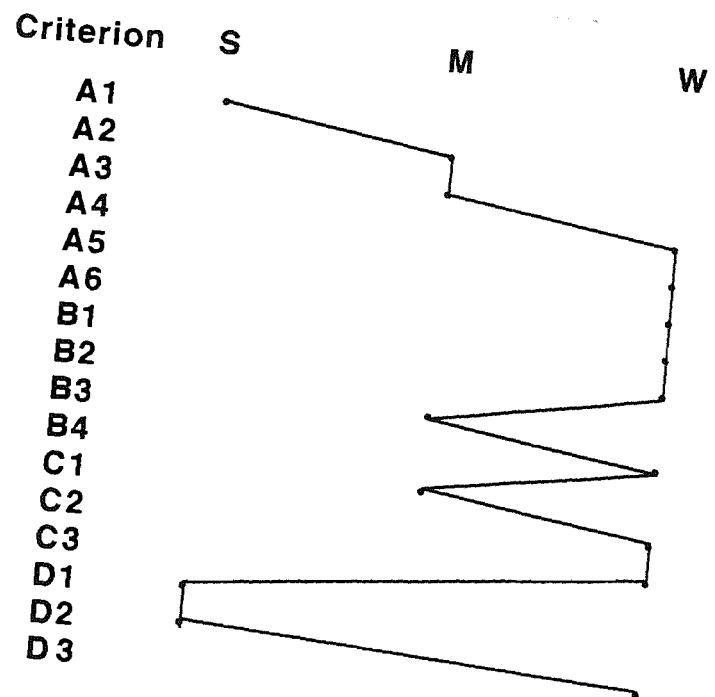
By the time of the final interviews a new headteacher had been appointed and had been in post for two terms. His view of marketing was very positive, and he perceived that marketing will become more important over the coming years. Changes had been made at the margins of practice (the date of the open day had been changed to place it in the summer term rather than the autumn term), but the organisational structures were largely still to be reviewed. The head was unclear of the role of individual staff within marketing, and of their responsibilities. He had, however, asked the governors to reinstate their defunct public relations working group. Formal evaluation of events had been introduced through questionnaire survey of all staff. The changes that had occurred, therefore, were limited in extent, but are demonstrated in Figure 8.2c.

#### **8.3.4 Bycars School, Manport**

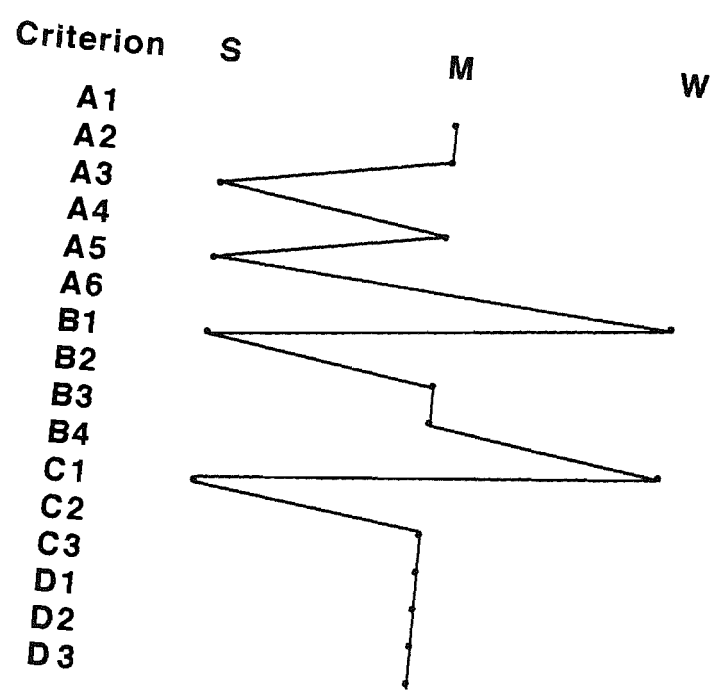
The development of a marketing culture within Bycars School is portrayed in the profile diagram in Figure 8.3a. It shows a variable pattern of development with some marked differences from the pattern displayed by the Alcheston schools.

The pattern of “attitude of mind” is one in which there is a good understanding of the nature of marketing by both the headteacher and the marketing manager ( the member of staff with responsibility for community liaison), but a very variable pattern of understanding amongst other





a) Bycars School



b) Hillview School

Figure 8.3 Marketing cultural development at Manport case study schools

colleagues (Figure 6.5). The headteacher indicated that it is ...

“...hard to distinguish marketing from fostering parental participation, and saying what is good - winning hearts and minds”

(Headteacher, Bycars School)

and the ‘marketing manager’s’ view of marketing was...

“Being aware of and sensitive to the needs of a client group, but also with some element of professional judgment and promotion of that judgment”

(Community / School Liaison Teacher, Bycars School)

This distinction between the views of ‘senior management’ and the rest of the staff emerges in the view of the place of marketing within schools. The headteacher and the marketing manager both expressed support for marketing providing it was not competitive and damaging to the prospects of other schools (category D in Figure 6.8). Amongst the sample of staff interviewed, however, there was a dominant view that marketing was not an acceptable concept (category C in Figure 6.11), and only two out of six shared the views of the headteacher and the marketing manager.

The school is characterised by a management structure based strongly in the headteacher’s position, where he “leads and takes most of the decisions” (Headteacher, Bycars School). Although he “listens and gets staff involved” (Staff member with responsibility for staff development), there is a clear view from staff that this is inconsistent and not influential, and leads to “disagreements amongst the SMT and undercurrents amongst the rest of the staff” (Head of Technology). This reveals the lack of a shared view of the aims and purposes of marketing (as, perhaps in other areas of management), which had not been assisted by the demise of a staff marketing group. This was perceived by several staff as evidence of the cosmetic nature of the consultation process, but was considered by one of the deputy headteachers to be symptomatic of the secure position of the school in the local market:-

“Competition with (other schools) is minimal, and (...) without any marketing our numbers on role would vary by only one or two percent. We should not put money into glossies, therefore”

(Deputy headteacher (Pastoral), Bycars School)

The school had no significant staff development programme for marketing. Beyond the headteacher’s own experience of leading marketing and management courses, and one half day of training for the ‘marketing manager’ at an INSET course provided by a local university, there was no training for marketing in the school.

The organisational system for marketing matches the Chief Executive Model (Figure 7.1), with the headteacher leading strongly and doing most of the work in this area. The marketing group that had existed, comprising the headteacher, the Head of Lower School, the Head of Year 7 and the Community Liaison Tutor (as Chair) had ceased to function by the head’s decision, and so the pattern of structure had changed from an Advisory Committee Model to the Chief Executive Model. Decisions by the headteacher are undertaken in the absence of either a marketing plan or a final version of the school development plan, which in its draft form contains no specific reference to marketing.

Budgeting is based on an annual cycle of identified needs, but this is in itself ad hoc and not related to long term planning. Recent expenditure has included advertisements in a regional “Good Schools Guide”, and a plan to re-structure the school’s reception area at a cost of £25,000. The pattern of budgeting matches Type A in Figure 7.6. Overall, the organisational structure is ‘weakly developed’ in most areas considered in this analysis.

Bycars School uses a range of promotional methods which have developed from traditional educational practice, but these are not linked to clear objectives and there is little evaluation of their process or impact. The key areas of focus are publications (prospectus and a monthly newsletter

to parents), meetings with parents (a termly meeting for the parents of each year group), and media links, which are perceived across the staff as well-managed. Visits to feeder schools are undertaken only by invitation from those schools, and this has been irregular in pattern in recent years. Little innovation in the field of promotional activities exists within the school, however, and in the area of promotional tools Bycars School is weakly developed.

In terms of the use of analytical tools, the school has a contradictory pattern of practice in which some analysis has been undertaken using appropriate tools, but the results of the analysis have been used only little. In two dimensions, therefore, the school may be seen to be 'strongly developed', but in the third only 'weakly developed'. The headteacher has compiled a detailed profile of the intake and catchment of the school, including the mapping of socio-economic data from the census, and the tracking of all pupils leaving the school. There exists, therefore, a detailed database on the nature of the market place in which the school operates, but this is not used as the basis of any form of marketing planning. In terms of the awareness of the school's internal strengths and weaknesses, one of the initial tasks of the marketing group (in 1989) had been to undertake a SWOT analysis. As with the external data, however, this was used only by the headteacher as informal background information, and played no overt role in a programme of planning and strategy.

### **8.3.5 Hillview School, Manport**

Figure 8.3b shows the profile of the development of a marketing culture at Hillview School in Manport. Of the schools studied within the case study element of the research, Hillview School has the strongest external reputation for its marketing activity. At the local level staff at Bycars School all commented on the active promotional programme that Hillview School is undertaking. The headteacher at Bycars School indicated that...

“ Although marketing is not a high priority (at Bycars School), competition from Hillview School might change all that. Waves from

the Hillview policy are irritating our Governors - for example, threats (by Hillview) to applicants not to visit Bycars or risk losing their place at Hillview. ”

(Headteacher, Bycars School)

At a national level the headteacher of Hillview had produced a number of journal articles in the field of marketing, and so had developed a high profile in the field. Of particular interest, therefore, is the relationship between the external image of the school's culture and practice, and the reality of its operation within the school.

In the area of “attitude of mind”, the pattern of understanding of the concepts in marketing (Figure 6.5) amongst senior staff shows a good understanding of marketing and public relations, but a less clear understanding of promotion and external relations. Their view of the value of marketing is generally positive, although both the headteacher and the Chair of Governors were keen to ensure that competition did not adversely affect other schools:-

“I'm keen on community schools and parental choice. Competition is good..... but it is of the utmost importance to do it professionally. We must not do down other schools”

(Chair of Governors, Hillview School)

Amongst the sample of staff interviewed, there was a clear understanding of some of the distinctions between marketing concepts, although their view of marketing was principally one of 'selling'. Although the sample was small (only four staff), the views were positive about the importance of marketing. Only one of the four expressed a reluctance at the development of marketing in schools.

The sharing of ideas on marketing in the school was linked to the management model adopted by the headteacher. Although frequent communication was evident in the production of “Briefing Notes” for staff and in the frequency of whole staff meetings, the communication was

principally 'top-down'. The sample of staff indicated that little or no consultation took place on the development of policy and practice. This communication pattern resulted in a shared knowledge of the aims of the head and, hence the school, but a perception from staff of a role for themselves as 'passengers on the train'. This is not seen in a critical way by the staff interviewed, however, and their views were expressed by a head of department:-

"Excellent marketing by the head projects a favourable and much-improved image"

(Head of Business Studies, Hillview School)

The range of staff development for marketing is small, however, and with the exception of the headteacher and the marketing manager no staff development has been undertaken in this area. Overall, therefore, the school's development in terms of "attitude of mind" might be described as 'moderately developed', with strongly developed aspects of the senior managers balanced by a lack of involvement and training for the rest of the staff.

The organisational system in relation to marketing at Hillview School represents the Chief Executive Model (Figure 7.1). The headteacher has appointed two colleagues to senior roles with responsibility for fund-raising and for publicity, but their role is as advisers to the Head and implementers of his policy and strategies. The headteacher indicates that "this is a headteacher-lead school.....(and) I work on intuition, not structures". The pathways and structures of responsibility for marketing and decision-making are clear, however, to staff.

No formal marketing plan exists, as the headteacher indicates that he has an "ad hoc approach to dealing with marketing". The school development plan was completed in 1993, and although it does not contain separate sections on marketing, a promotional theme underpins much of its content. The linkage between long-term planning and budgets

is not well-developed, and the school's budgeting system matches Type A described in Figure 7.6, with a fixed budget allocated to specific areas (eg the prospectus) and ad hoc allocation of finance to other activities as they arise. The headteacher indicated that there is "little finance for marketing per se", but the key role of staff commitment and morale in developing the 'quality' dimension of marketing is apparent in his comment that...

"The best marketing expenditure is the £20,000 spent mainly on staffing to enable 32 promotions to be implemented"

(Headteacher, Hillview School)

Despite the high profile of promotional activity in the school and the centrality of the concept of meeting customer 'wants', the school undertakes no formal evaluation of its marketing other than observing changes in pupil recruitment. The school may be seen, therefore, overall to be "moderately-developed" in terms of its organisational system.

In the fields of the use of promotional tools and the application of analytical tools there is a variable range of practice at Hillview School, but one which indicates, overall, a moderately developed culture but with some key areas of strong development. A range of promotional methods is used, including the traditional communication systems that most schools use. The focus is on three strategies, however. Firstly, the school seeks to bring as many pupils and parents as possible on to the campus, as exemplified by the availability of the school swimming pool to Year 6 pupils from the locality. Secondly, the headteacher seeks a high profile in the community, and has well-developed media links which are frequently used. Thirdly, the school seeks to enhance communication both with parents and with the community. A pupil newspaper is distributed to parents, and to the school's neighbours. This is written and edited by pupils but produced professionally by staff using desk-top publishing techniques. Beyond this, the headteacher seeks to be rapidly and overtly responsive to parental or community feedback. He is seen "out in the streets" (Headteacher), in that he meets parents at the school gate and visits the school's neighbours. Through feedback he seeks to develop the school's distinctive identity and

ethos, for...

“Hillview’s niche is discipline, control and good uniform”

(Headteacher, Hillview School)

The aims of each promotional and communication method employed by the school is clear to both senior management and the staff of the school, although understanding the external environment and the internal environment is taken on by the headteacher who uses formalised informal methods (“the grapevine” (Headteacher)). This is used to inform and direct the school’s promotional strategies. Little formal evaluation of the processes and outcomes takes place, however.

### **8.3.6 Fenside School, Norbridgeshire**

The profile of the development of a marketing culture at Fenside School, Norbridgeshire is illustrated in Figure 8.4a.

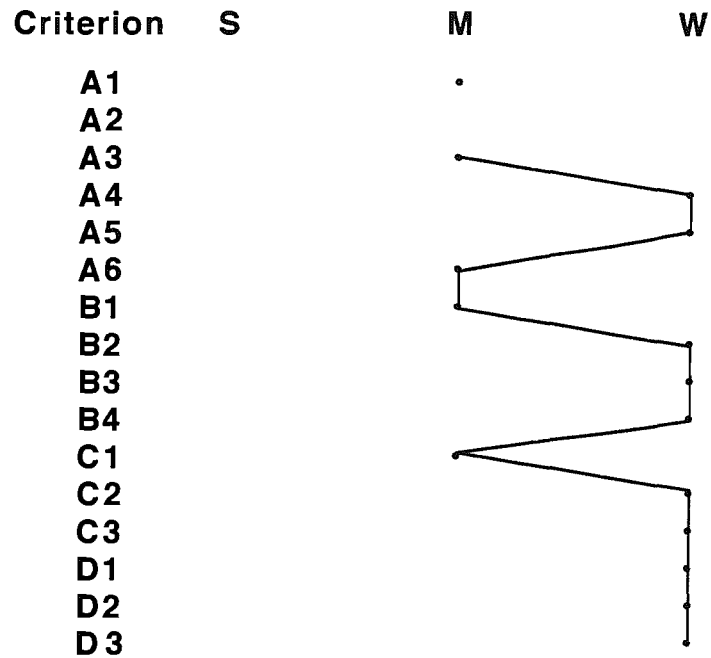
At Fenside School the headteacher assumed the role of marketing manager, and demonstrated an understanding of differences in the key terms within the marketing environment. In describing marketing as.....

“Putting up in front of people the good things about the school and making available to parents as much information as possible to encourage pupils to come and to make them aware of our standards and values”

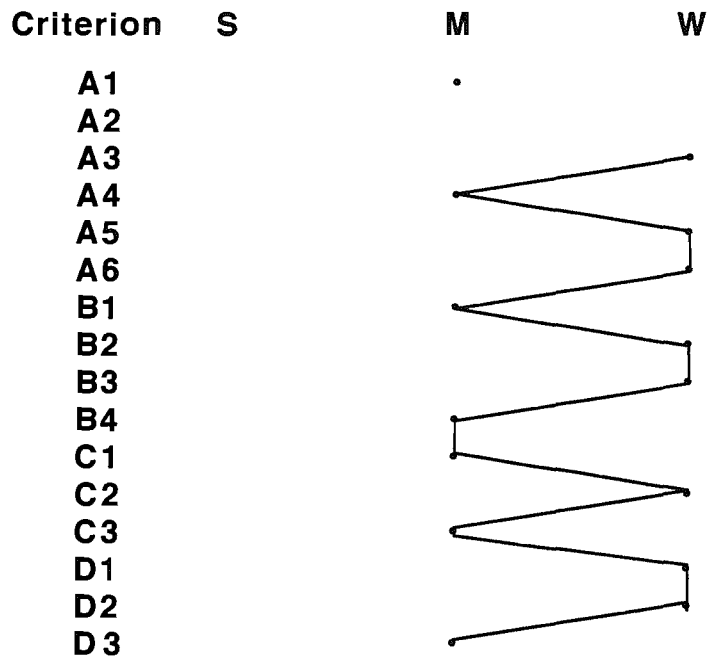
(Headteacher, Fenside School)

.....there is a view of marketing as “telling plus selling”. The head presented a positive view of the place of marketing within schools providing “it is not too strong”. Discussion on marketing is largely confined to the SMT with the delegation of tasks as necessary to other colleagues, which indicates relatively little communication on policy and practice and little opportunity for sharing the aims across the whole staff. No programme of training or staff development in this field has been undertaken, although





a) Fenside School

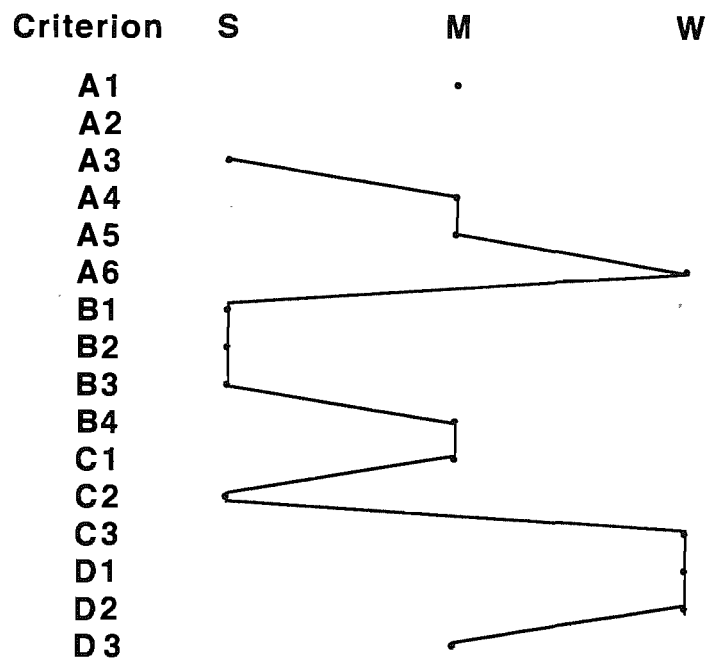


b) Chalklands School

(Continued.....)

Figure 8.4 Marketing cultural development at Norbridgeshire case study schools (1)

(.....Continued)



**c) The Abbey School**

**Figure 8.4 Marketing cultural development at Norbridgeshire case study schools (2)**

the headteacher and one of the deputy heads attended a one day course on media links provided by the local radio station. In the field of “attitude of mind”, therefore, Fenside School may be seen as ‘moderately developed’, but with a number of areas of ‘weak development’.

The organisational system for marketing employed by the school matches the SMT Model (Figure 7.1). The headteacher takes the lead in marketing issues, but the SMT is the forum for the discussion of practice and strategy, with responsibilities allocated as necessary. This is in part the product of operating in a small school environment, for the headteacher suggests that.....

“ We are a small staff (38.5 fte) and I cannot find someone

appropriate to coordinate (marketing) activity, so it falls on to the head. I have considered giving the role to a single admin. officer.”

(Headteacher, Fenside School)

The operation of marketing is undertaken in the context of no marketing plan and a school development plan with little reference to marketing or promotion beyond individual events. For example, the 1992/93 Plan included the aim of marketing the new buildings for community use. In the absence of such a planning structure, the budgeting is ad hoc. A sum is allocated to the prospectus each year, but other budgeting is “random..... and reactive” (Headteacher), conforming to Type B budgeting as described in Figure 7.6. No formal evaluation system exists for marketing. The pattern of development in the field of the organisational system for marketing must be seen, therefore, as ‘weakly developed’.

The principal promotional tools used by Fenside School are the prospectus (re-designed by the headteacher in 1993), visits to the school’s seven main feeder schools by the colleague with responsibility for primary liaison, and the use of a termly newsletter to parents. Some innovation is occurring within these approaches, including presentations to both pupils and parents in the feeder schools. The use of these approaches is not linked to a clear expression of their aims beyond a general idea of ‘recruitment’, and no evaluation of their effectiveness has been undertaken. The headteacher suggested that..

“We may not need to do primary liaison, but we do not know”

(Headteacher, Fenside School)

Within the field of the use of analytical tools the school has not undertaken any formal analysis either of its operating environment or its internal structures and culture in relation to marketing. In both dimensions of promotional tools and analytical tools, therefore, Fenside School must be seen as ‘weakly-developed’.

### 8.3.7 Chalklands School, Norbridgeshire

Figure 8.4 b shows the development profile of the marketing culture within Chalklands School in Norbridgeshire. As with Fenside School, it represents the responses of the headteacher and these have not been cross-referenced to the views of other colleagues and staff. Item A2 in the profile cannot, therefore, be completed, since it represents the views of the whole staff.

The headteacher at Chalklands School demonstrated an understanding of some of the key differences between marketing terms, but expressed a negative view of the role of marketing in schools...

“...because it is premised on the notion of pupils as customers buying a good, but education is about rights and entitlements”  
(Headteacher, Chalklands School)

Her perception of marketing was one of “selling to customers” with a perspective of communications about the school. In the absence of a marketing plan or clear marketing aims in the school development plan, there is no common statement of aims for staff to share. The absence of a formal staff development programme in this area means that the sharing of aims for marketing is not a current priority. Although the headteacher indicated that within the school “there is a changing awareness of external relations needs and it is a really powerful influence”, the development of the field of attitude of mind within the profile appears to be weakly developed at Chalklands School.

The school's organisational system for marketing is based in the SMT Model (Figure 7.1). There is “no planning - we simply discuss events” (Headteacher), with the delegation of specific responsibilities to individuals. The headteacher, for example, has lead the re-design of the prospectus, but this will be delegated to another SMT member for future years. Some evaluation of strategies is undertaken by the SMT, and each event is formally debriefed at SMT meetings. The absence of strategy and

planning is reflected in the budgeting system for marketing, which matches Type B in the classification in Figure 7.6. The headteacher indicated that...

“Budgeting is ad hoc, but extra money is put in as necessary, for example to redesign and upgrade the Year 9 Choice Booklet”

(Headteacher, Chalklands School)

The pattern of the organisational system, therefore, presents a mixed profile of development, with some areas moderately developed, but others weakly developed.

The use of promotional tools and analytical tools at Chalklands School is weakly-developed in broad terms. The main promotional strategies are the prospectus, a monthly newsletter to parents, an open evening in the autumn term, a primary school liaison programme, and an induction day for new pupils. Feeder school liaison is regarded by the headteacher as “very good”, and includes visits by the Head of Year 7 to each feeder school to talk to pupils, and a monthly meeting with the heads of the primary schools in Chalklands ‘cluster’. These represent traditional school external relations approaches, and Chalklands has not developed any innovations in this area. Beyond the broader aims of creating good relations and recruiting pupils, there are no clear objectives for each element of the programme. Evaluation of individual events within this programme is undertaken at regular SMT meetings. The school has not used any analytical techniques to consider either its internal operating environment, or its external market, although the headteacher has a clear perception of the nature of competition for pupils within the school's feeder primaries. A small amount of marketing research has been undertaken through a questionnaire to parents with the newsletter about its format, content and character. In a formal way there is no mechanism for linking marketing awareness to strategies because of the absence of a planning structure, but it is clear that the headteacher uses her interpretation and perceptions to provide guidance on the planning of future events. The head indicated that there was an intention to undertake a more formalised programme of eliciting parental responses to the school's operation, but

that her own relatively recent appointment meant that this lower priority issue had not yet been addressed.

### **8.3.8 The Abbey School, Norbridgeshire**

Figure 8.4c shows the marketing development profile of The Abbey School in Norbridgeshire. In contrast to Fenside School and Chalklands School, The Abbey School's location on the urban fringe brings it into competition both with the relatively scattered distribution of schools in its rural hinterland and with the full range of schools within the city. Its profile, therefore, shows a number of contrasts with those of the two other Norbridgeshire schools studied. Within The Abbey School the opportunity to interview the headteacher, two of the school's governors, and the bursar, who acts as 'marketing manager', also enabled some element of cross-referencing to occur.

In the sphere of attitude of mind, there was a clear understanding amongst each of the interviewees of the distinctiveness of the key marketing terms, although there were some differences in understanding of the idea of marketing itself. While the headteacher perceived marketing as responding to the needs and wants of the local community, the governors and marketing manager understood the term as pupil recruitment and communicating about the school to the community. The bursar's perception was essentially one of generating income. The positive view of marketing within the school was emphasised by all those interviewed. The headteacher explained that...

"There can be a conflict between marketing and educational culture... (but) there is a positive perspective by staff. Few staff are anti. The business manager is seen as taking this responsibility away from staff and has raised the school's profile in the city. This is good for jobs and good for promotion, and the staffroom thinks it is worth it"

(Headteacher, The Abbey School)

The communication of policy and practice at the school to all staff does occur, but is a process of 'top down' information flow rather than consultation. With good communication, though, and a perception that the promotional and marketing programme provides benefits there is a view from senior staff that there is a shared view of the school's marketing aims across the whole staff. There is no programme of staff development in this field. Overall, in terms of 'attitude of mind' The Abbey School must be seen as moderately developed, but strongly developed in some areas, including the existence of a positive view of marketing.

Planning and decision-making for marketing is based on an Advisory Committee Model (Figure 7.1). This comprises the business manager, two governors, the headteacher and two other staff representatives, who provide policy and strategy advice to the SMT and to the governing body. The involvement of the governors in this committee provides the only example of the Participative Model of governor involvement from within the case study schools (Figure 7.2). Although no separate marketing plan exists, the SDP contains a separate section on marketing with clear aims and strategies. The budget is linked to the provisions of the SDP, and so represents Type C budgeting as illustrated in Figure 7.6. The headteacher holds the budget, and provides finance in a reactive way to specific needs in addition to the SDP-driven budget. Little evaluation, however, is undertaken in a formal way of the strategies employed beyond broad brush ideas of changes in pupil recruitment or income. Overall, therefore, the organisational system at The Abbey School is strongly developed.

The principal promotional tools used by The Abbey School are a range of literature, including prospectus, newsletter, community college information, a 'lettings' leaflet, and the governors report. Apart from the prospectus, these are distributed to the local community. The literature is being re-designed to incorporate the new logo developed by staff and parents. The headteacher perceives that the use of school uniform is an important promotional strategy in countering the formerly very negative image that the school had. The new uniform was designed by a committee

including parents and pupils, and their ideas were tested with parents before implementation. The purpose of each strategy is clearly defined within the SDP, although little evaluation of their effectiveness is undertaken. The use of promotional tools must be regarded, therefore, as moderately developed.

The use of analytical tools in the development of strategy is not well-developed. Little formal use has been made of them for analysing the internal or external environment, although the use of specific marketing research in relation to individual elements of strategy has occurred. This has included a survey of parents whose children came to The Abbey School as second choice, to investigate the influences on parental choice, and the involvement of parents and pupils in the design and development of the logo and the new uniform. The use of analytical tools must be seen as moderately developed, therefore.

#### **8.4 An Index of Marketing Cultural Development**

The description and analysis of the development of a marketing culture in the case study schools in Section 8.3 has been interpreted through the use of profile diagrams. These provide a visual summary of development in relation to a wide range of factors within the four main criteria derived from Cowell (1984).

A visual impressionistic comparison of the profiles in Figures 8.2, 8.3 and 8.4 shows important differences between the patterns of development in the different schools. To facilitate comparison between them a simple numerical Index of Marketing Cultural Development (IMCD) can be calculated. This is derived by allocating a value of 2 to each category in which a school is recorded as "strongly developed", a value of 1 to each a category in which a school is recorded as "moderately developed" and a value of 0 to each category in which a school is recorded as "weakly developed". The IMCD is calculated by summing the scores for each school. This method assumes an equal weighting for each of the categories in the full profile. The maximum IMCD that could be achieved



would be 32, with a minimum value of zero.

Figure 8.5 shows the IMCD scores for the eight case study schools. The highest IMCDs are recorded by Hillview School in Manport (18), and The Abbey School in Norbridgeshire (16), while the lowest values are recorded for Fenside School, Norbridgeshire (5) and The Lee School in Winsford (Alcheston) (6). Figure 8.5 also shows the calculations of the Mean IMCD for the case study schools in each of the three locations (Alcheston, Manport and Norbridgeshire), which suggests a similar level of marketing culture development in Alcheston and Norbridgeshire, but a higher level in Manport.

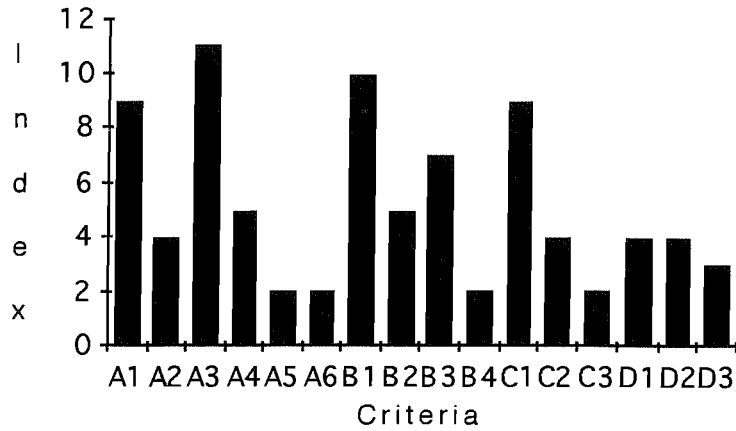
This contrast in cultural development is not simple to analyse, and a range of influential factors might be considered as important, including the proximity to competitor schools, the existence of non-competitive agreements between schools, and the nature of the population change within the community served by the school. The pattern outlined in Figure 8.5 suggests a contrast between rural and urban schools, which emerges very clearly when the schools are grouped by their urban / rural location rather than by their place in a case study group, as shown in Figure 8.5. The range and importance of influences on the pattern of development of the marketing culture will be discussed in Chapter 9. A more substantial data set of IMCDs for schools in different environments would enable the influence of different factors to be measured statistically, and this is clearly an area of potential for future research.

## **8.5 The Components of Marketing Cultural Development - A Comparative Analysis**

Within the analysis of profiles presented in Section 8.3 not only were there contrasts between the schools in terms of profile, but also a range of development between the sixteen different criteria that make up the profile. Figure 8.6a presents the sum of the values scored for each school for each of these criteria. It shows, therefore, the areas where development of the marketing culture is strongest and less strong across

<u>SCHOOL</u>	<u>IMCD</u>
<b><u>Alcheston</u></b>	
Castle School	12
Downsview School	10
The Lee School	6
Mean IMCD for Alcheston	9.3
<b><u>Manport</u></b>	
Bycars School	10
Hillview School	18
Mean IMCD for Manport	14
<b><u>Norbridgeshire</u></b>	
Fenside School	5
Chalklands School	7
The Abbey School	16
Mean IMCD for Norbridgeshire	9.3
<b><u>Mean Values by Rural / Urban Status</u></b>	
Mean for "city" schools (Bycars, Hillview, The Abbey)	14.6
Mean for "town" schools (Castle, Downsview)	11
Mean for "rural" schools (The Lee, Fenside, Chalklands)	6
<b><u>Mean IMCD for Case Study Schools</u></b>	
Mean for all case study schools	12

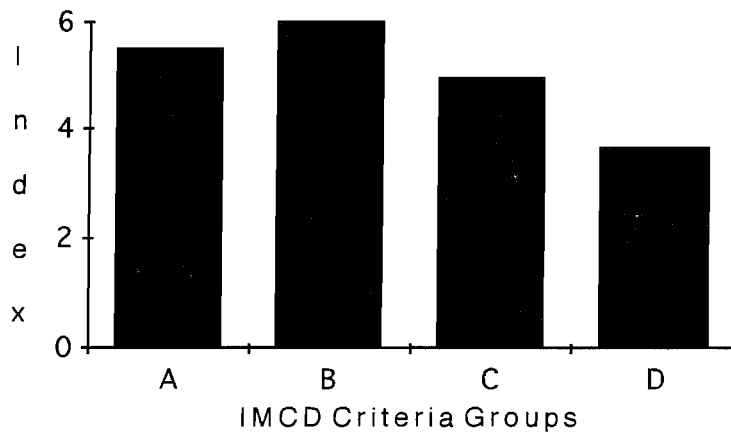
Figure 8.5 Index of Marketing Cultural Development (IMCD) for the case study schools



**Key**

For criteria see Figure 8.1

**a) Relative development of individual criteria of marketing culture**



**b) Mean index for IMCD criteria groups**

**Figure 8.6 The development of individual dimensions of marketing culture**

the case study schools. Figure 8.6b shows the mean total score for the criteria within each of the four principal categories of “attitude of mind” (A), “organisational system” (B), “promotional tools” (C) and “analytical tools” (D).

The “broad brush” pattern in Figure 8.6b suggests that there is greatest development in terms of organisational systems, but that there is not much difference in development across categories A, B and C. The use of analytical tools (Category D), however, shows less development with a mean total score across its three criteria of 3.7. The more detailed analysis presented in Figure 8.6a suggests that variations between criteria within the four categories are larger than variations between the categories. The most developed single criterion is A3, the development of a positive view of the role of a marketing perspective (Index = 11), with criteria B1 (the development of a system of responsibility and decision-making for marketing), C1 (the use of a range of promotional methods) and A1 (the understanding that senior staff have of the concept of marketing) recording a high index score. In relation to this latter criterion it must be emphasised that the high index indicates only that senior staff have a clarified view of the concept in their own terms. It does not indicate either that they share the conceptual understanding or that their understanding is “correct”. It is a measure of the process of concept clarification rather than its outcome. In contrast, categories A5 (a shared view of the aims of marketing within the school), A6 (staff training and development), B4 (the development of a formal evaluation system for marketing) and C3 (the evaluation of promotional tools) each score only 2 on the index and are regarded, therefore, as weakly developed in the case study schools. This analysis provides a simple picture of the nature of the development of a marketing culture in schools, and highlights areas of greater and lesser assimilation. It also acts as an indicator of training needs where the continued development of marketisation is deemed appropriate policy.

## 8.6 Summary

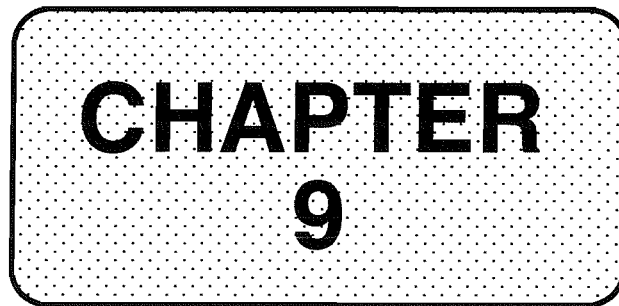
Chapter 8 has considered the development of a marketing culture within the case study schools in Alchaston, Manport and Norbridgeshire. A criterion-based model to describe this development was derived from Cowell's (1984) description of the components of a marketing culture in the service sector. This cultural development is regarded as comprising "attitude of mind", the development of an appropriate "organisational system", the use of "promotional tools" and the use of "analytical tools" as part of a marketing research and planning system, and a range of 16 criteria were included in the model. Each of the case study schools was considered in relation to the model, and a profile constructed to display this pattern of development (Figures 8.2, 8.3, and 8.4). From the profiles it was possible to develop an Index of Marketing Cultural Development (IMCD), which enabled some dimensioning of the development which had been observed. Finally, the relative development of each of the components of cultural development was considered to identify in which dimensions cultural development had progressed furthest amongst the case study schools.

The key findings and conclusions are:-

- There is substantial variation in the development of a marketing culture between the schools in the case study.
- The schools in Manport demonstrate a higher IMCD than the schools in Alchaston and Norbridgeshire.
- A range of factors might be considered as influential on the development of a marketing culture, including the nature of the local market and the demographic trends in particular localities. Using the IMCD it is possible to identify a difference between city schools (most developed), town schools, and rural schools (least developed).
- The most developed and least developed elements of marketing culture varied from school to school.
- Overall, the most developed components of the marketing culture were:- the development of a positive view of the role of a marketing perspective;

the development of a system of responsibility and decision-making for marketing; the use of a range of promotional methods; and the understanding that senior staff have of the concept of marketing.

- The least developed components of a marketing culture were:- a shared view of the aims of marketing within the school; staff training and development for marketing; the development of a formal evaluation system within a planning framework for marketing; and the evaluation of the promotional tools that were used by the school.



**CHAPTER  
9**

**Discussion - Perspectives on Marketing in Secondary  
Schools**

## Chapter 9

### Discussion - Perspectives on Marketing in Secondary Schools

#### 9.1 Introduction

The primary aim of this research programme has been to describe, analyse and model the developing organisation and culture of the 'supply side' of the secondary education market place in a number of specific case study environments. This has enabled some first conceptualisations of a range of processes operating in schools, and has also provided evidence against which to consider some of the generalisations emerging from the small number of studies in this field that have been undertaken previously. In addition, although focused on the 'supply side', the demand-supply dichotomy is only a simplification of an interactive market system, and the study has inevitably provided contributions to understanding some elements of the 'demand' side, for example, by considering parent and pupil perceptions of the 'supply' side.

This chapter will highlight briefly the key findings of the study (Section 9.2) to provide a background to the development of a number of integrating ideas and themes that emerge from the research programme (Section 9.3). Secondly, it widens the focus by considering the contribution that these findings make to a broader understanding of the education market place in the context of the research methodology that has been used (Section 9.4). Thirdly, the chapter considers possible developments in the secondary school market place and in the practice of marketing in the future (Section 9.5). The final section addresses the research agenda for the future that emerges from the study (Section 9.6). Two specific research dimensions are considered - questions and foci for further research emanating directly from this study, its findings and its approach; and issues for a research agenda in the wider field of education markets and marketing.



## **9.2 Key Findings and Conceptualisations**

### **9.2.1 Research Foci and Key Questions**

The study has considered marketing in secondary schools through two main strategies - the application of a case study methodology to schools in three contrasting locations (Alcheston, Manport and Norbridgeshire), and a small scale modified Delphi survey of 'expert schools' from across England and Wales. This has enabled three key questions to be considered, viz...

- (KQ1) How is the concept of marketing received and understood in schools ?
- (KQ2) What have decision-makers in schools, whether they be headteachers, governors or classroom teachers, done to modify the organisation of the school's management in response to pressures towards marketisation ?
- (KQ3) How far has a marketing culture developed within secondary schools as a result of the marketisation of education ?

These cover the broad fields of the knowledge and understanding of marketing, the organisation and practice of marketing, and the development of cultural change in schools to accommodate the marketing culture. The main findings in each of these areas will be considered below.

### **9.2.2 Knowledge and Understanding of Marketing**

The evidence from the research programme suggests that there is a diverse range of understanding of key concepts in marketing within schools. This ranges from an undifferentiated perspective, where marketing, selling and promotion are regarded as synonymous, to a differentiated view, where the terms are understood as distinct. The differentiated perspective itself generates a number of operational stances, ranging from a 'selling' perspective to a client-focused perspective. There

are a range of influences upon the perspective an individual or a school may hold, including career and professional experiences and the nature of the market place within which the school operates, and 'spectral drift' between different positions on the spectrum of understanding may occur.

Marketing as a valid approach for schools is generally supported by senior staff in schools. Two thirds of the broader staff sample also expressed either unreserved support for the operation of the market place, or a conditional acceptance of it balanced against a concern to mitigate the most serious negative consequences of competition. Most staff see marketing as important for their school's future. The acceptance of marketing is seen to be the product of 'push' factors and 'pull' factors (attractive dimensions of marketing), with pull factors being perceived as more important reasons for developing the marketing culture. The major 'pull' factors were identified as the desire to publicise the school's successes, the desire to identify and satisfy parental and pupil needs, and the pursuit of quality in the work of the school. It is not clear how this emphasis on 'pull' factors represents 'capture by the discourse', the justification of actions *post hoc*, or a genuine commitment to marketing as an approach, but the practical consequence is an acceptance and support for the idea of marketing.

From these perspectives it is possible to identify a model of marketing in education which combines the dimensions of communication, quality, recruitment of pupils and a customer-focused view of the school as an organisation (Figure 6.15). This enables a 'conceptual field' to be devised which represents the alternative operational perspectives of schools in relation to three key perspectives - recruitment, quality and customer focus / market accountability (Figure 6.16).

The analysis in relation to KQ1 also informs the 'demand side' of the system, by identifying the attitudes of parents to marketing. Most express a strong support for the ideas of parental choice and of schools meeting parental wishes and needs, but there is a clear perspective that strong promotional activity is inappropriate.

### 9.2.3 Marketing Organisation and Practice

The second key question has enabled a number of dimensions of the management of marketing to be identified. As a management activity it occupies relatively little time, although this is seen to be increasing and is identified as an area where more time should be spent. In operational terms, marketing is largely an activity of senior management, with little involvement of governors, and little integration of a wider spectrum of staff into its planning or implementation. While a range of organisational models can be identified in schools to manage the marketing function (Figure 7.1), most adopt a Senior Management Team model of practice. This focus within senior management is emphasised by the pattern of staff development in relation to marketing. While this is limited in extent *in toto*, the training that does occur is restricted to short courses attended by headteachers and their senior 'marketing manager' colleagues. The broader staff see a need for staff development in this area.

Planning for marketing is substantially informal, reactive and non-rational, and bears little relationship to the planning approaches developed either in terms of whole school development (eg Marsh (1993)) or specifically in terms of strategic marketing (eg Gray (1991); Hanson and Henry (1992)). Few schools have marketing plans either as separate documents or within school development plans. Most practice is based on subjective judgments of market needs, for there is little marketing research undertaken. However, in some of the 'expert survey' schools some innovation in this area is occurring with the development of low cost, 'appropriate technology' marketing research. Evaluation of practice, process or outcome in the field of marketing is not well developed, and is largely ad hoc, reactive and informal. Budgeting is ad hoc for marketing, and, with the exception of finance for key promotional literature, is largely based on reactive identification of short term needs using residual funding after all other budgetary needs have been met. It is rarely linked to the planning and strategic process.

Promotional strategy is largely based on the use of traditional

school communication methods, although the 'expert schools' show some evidence of innovation in this area. Four key strategies used by schools can be identified (the prospectus for parents; open days; visits to feeder schools by staff; visits to the school by parents of prospective pupils) which are of substantial importance to both short-term and long-term recruitment goals (Figure 7.10).

KQ2 also provides an opportunity to understand some dimensions of parental choice and the role of different communication strategies. Two key ideas emerge. Firstly, the concept of the 'composite consumer' is helpful in understanding who makes key decisions about school choice. The 'composite consumer' is a combination of parent plus pupil, with each playing a part in the decision process. At age 11 this study suggests that parental views are important, and more important than those of pupils, but that they operate within a framework of constraint provided by pupil views. It can be hypothesised that the balance of influence of parent and pupil in the composite consumer is variable, and that generally the pupil influence increases with age. Hence decisions at 16 or 18 will be more dominated by pupil / student choice, but that parental voice will still have some role to play.

Secondly, the study enables the importance of 'word-of mouth' in school choice to be dimensioned. Responses from parents and pupils suggest that some 40% of the information sources that are important are not directly controlled by the school, but are mediated by, for example, other parents, the community or the media. We might deduce therefore that only 60% of parental choice is directly influenced by promotional strategies.

#### **9.2.4 Marketing Culture in Secondary Schools**

The final key question considered the broader concept of cultural change in schools, and the adoption of a marketing culture. This was considered in terms of a criterion based analytical model based on Cowell's (1984) identification of four dimensions of marketing cultural

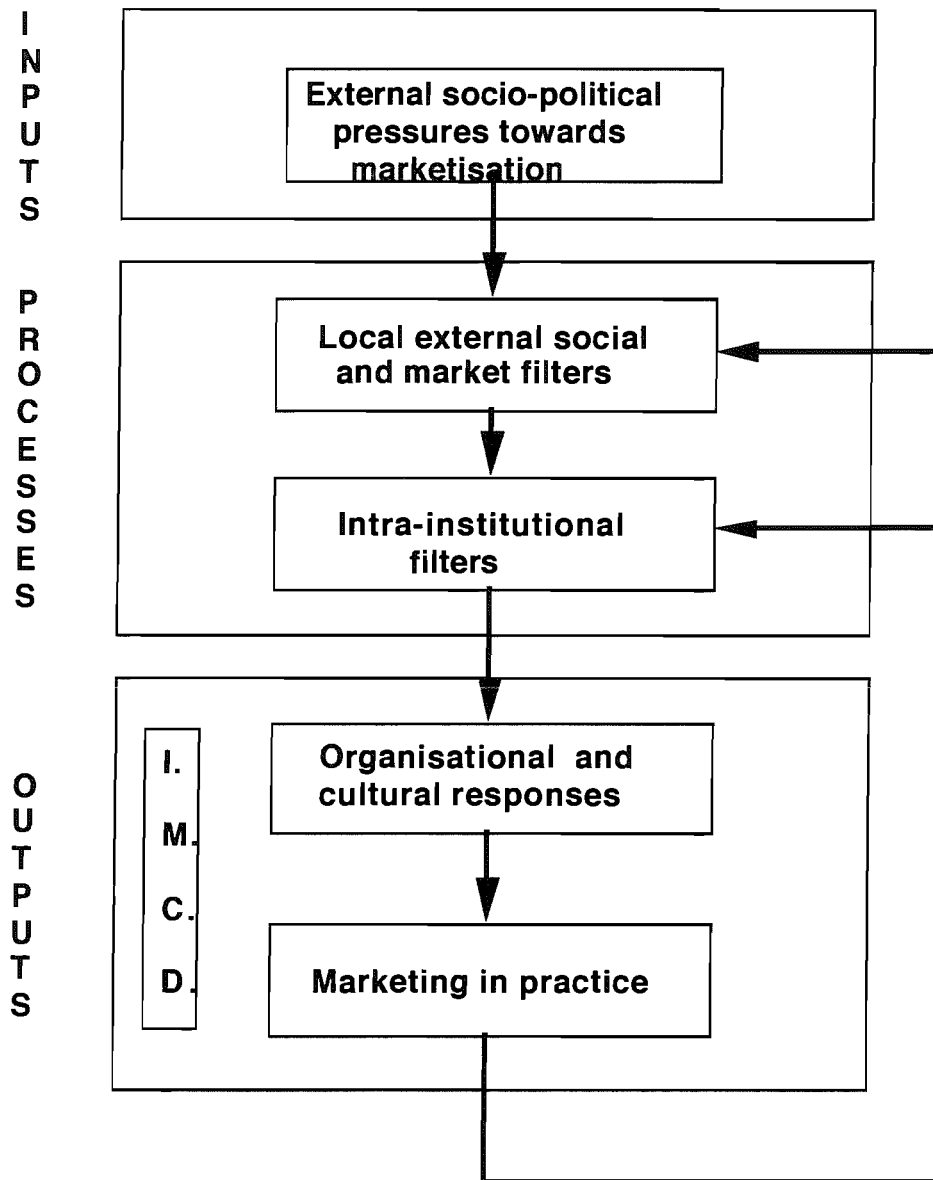
development in a service industry - attitude of mind; an appropriate organisational system; the use of promotional tools; the use of analytical tools. Using 16 criteria across these four dimensions, each case study school was profiled in terms of marketing cultural development. An Index of Marketing Cultural Development (IMCD) was derived from this analysis.

This analysis showed large variations between the case study schools, with the highest IMCDs in Manport. None of the schools studied was perceived, overall, as being more than moderately developed in terms of a marketing culture. A range of factors was identified as influencing this development, including local market conditions and demographic trends, but the clearest distinction was between city, town and rural environments. Overall, the most developed dimensions of the marketing culture were a positive view of marketing, the development of a management organisational structure to deal with marketing, and the use of a range of promotional methods. The least developed dimensions were a shared view of marketing aims across the whole staff, the presence of staff development activities and programmes, and the development of an evaluation system for marketing activities.

### **9.3 Integrating Perspectives on Marketing**

#### **9.3.1 Modelling the Marketisation Process**

The analysis of the development of marketing, outlined above, provides a useful perspective on the process of marketisation in schools. The case study analysis in Chapters 6,7 and 8 provides an insight into the current outcomes of this process, and an interpretation of the range of likely outcomes. These are illustrated in the models portrayed in Figure 6.14 (the spectrum of understanding of the marketing concept), and 6.15 (the field of marketing activities), and in the application of the Index of Marketing Cultural Development (Figures 8.2, 8.3 and 8.4) . By combining these perceptions of the process and product of marketisation it is possible to construct a model which portrays marketisation in secondary schools, and which may be of value in analysing marketisation in the broad field of

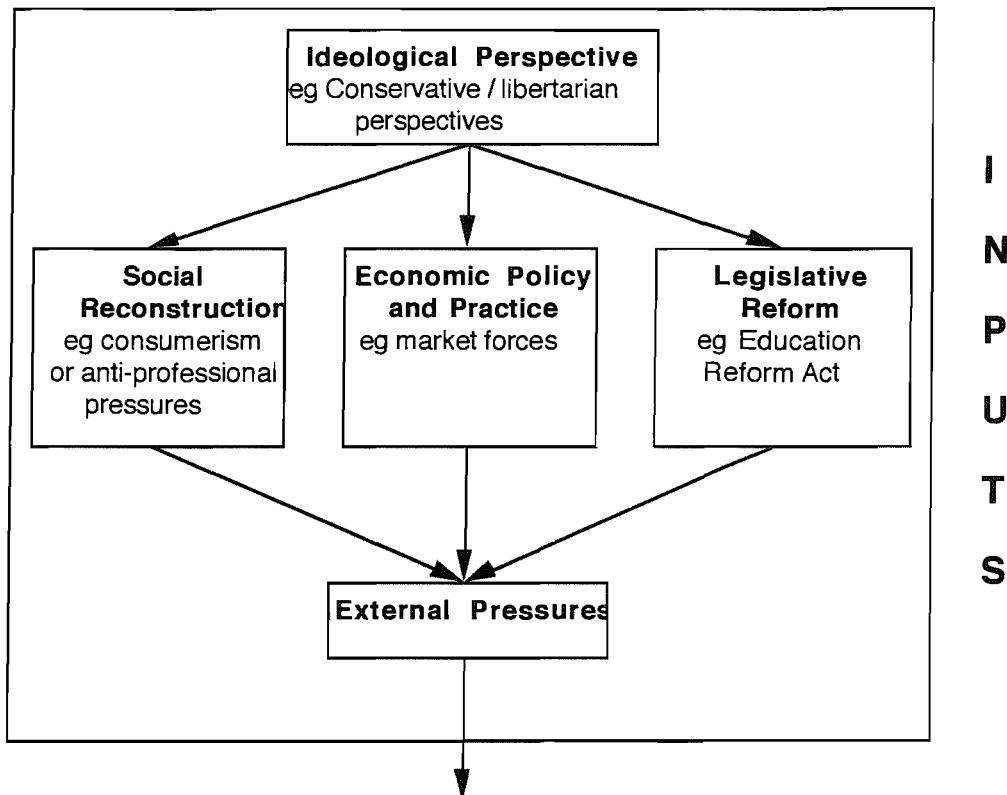


**Figure 9.1 A model of the marketisation process**

education. Figure 9.1 shows the basis of such a model, which portrays marketisation as an input-output process. Figures 9.2, 9.3 and 9.4 provide more detail to each of the three structural components of the model - inputs, processes and outputs.

The inputs are macro-scale social, economic and political pressures from beyond the operational marketing environment of the individual school, and include both legislative pressures and social

pressures to change. Figure 9.2 demonstrates how these derive from ideological perspectives. The nature of these forces has been discussed in detail in Chapter 1.



**Figure 9.2 Inputs to the marketisation process model**

These pressures to change are received in the school but are subject to the filtering effect of two groups of processes before they are converted into organisational and management practice (Figure 9.3). The first of these is the external local environmental factors, which will include the socio-economic and political profiles of the community served by the school and the nature of competition in the local market. These will themselves be framed by local demographic trends, resulting either from migration patterns or from natural demographic change. In addition, a whole range of geographical and locational factors, such as the proximity to neighbouring schools, accessibility of the school by public transport and the local community's "tribal maps", will act as filters to the pressure to marketisation. These pressures will "form" the operational environment of

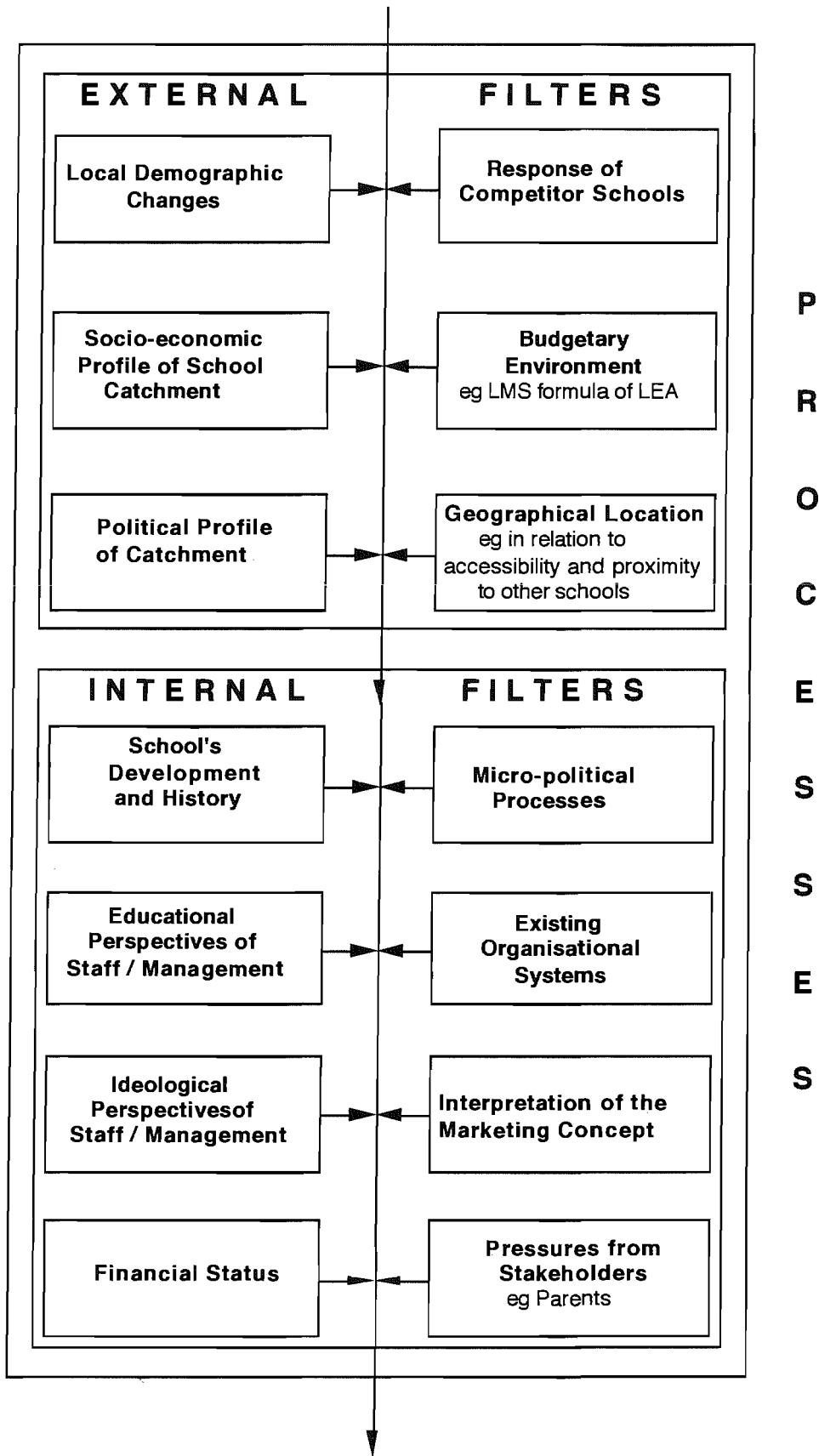


Figure 9.3 Filters in the marketisation process model



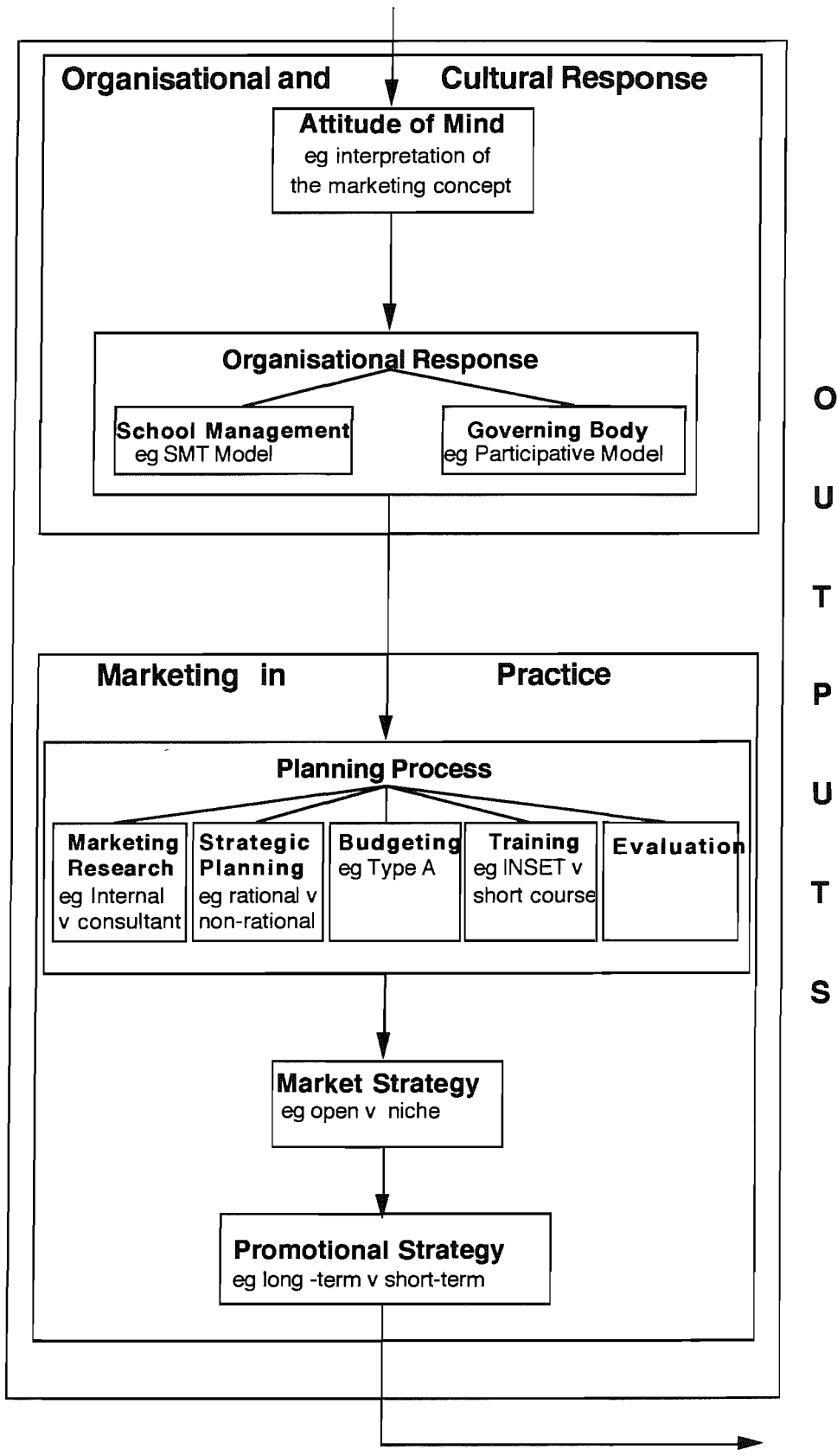


Figure 9.4 Outputs in the marketisation process model

the school. A second set of filters operate at the micro-scale and represent the internal processes of the school. These have been well described by Bowe et al (1992) and Gerwitz et al (1993), and have been outlined in Chapter 2,3 and 4. These include the micro-political tensions and processes in the school, the history of the school and its operation and a range of personal dimensions that influence the reaction of key gatekeepers and decision-makers within the school's organisation.

The outcomes are the visible responses of these filtering processes, and include the organisational and cultural changes that might be observed, and the operational activities (eg promotional activities, marketing research etc) that are put into place (Figure 9.4). This field has been the primary focus of the research within this thesis, and the pattern of responses by both the case study schools and the expert survey schools have enabled a range of conceptualisations to be developed in Chapters 6, 7 and 8. In simple terms, attitude of mind may be seen to influence the organisational response, and both together then shape the planning process, and the identification of a marketing strategy and a linked promotional strategy.

Two further points are important. Firstly, the model suggests that the outcomes will themselves then feed back to influence the subsequent internal and external filtering processes, since outcomes inevitably produce changes in the organisation's operational environment. They contribute to the micro-political processes in the school and influence the operation of the marketing environment. It is suggested here that the activities and strategies of schools are themselves a major factor in making or shaping the market place within which parental and pupil choice takes place.

Secondly, the model in Figure 9.1 shows the Index of Marketing Cultural Development (IMCD) alongside the organisational and practice "boxes" in the outputs field. This is included to emphasise that the IMCD is a measure of the level of development in all of these areas combined, and is, in many ways, a summative measure of the outputs field.

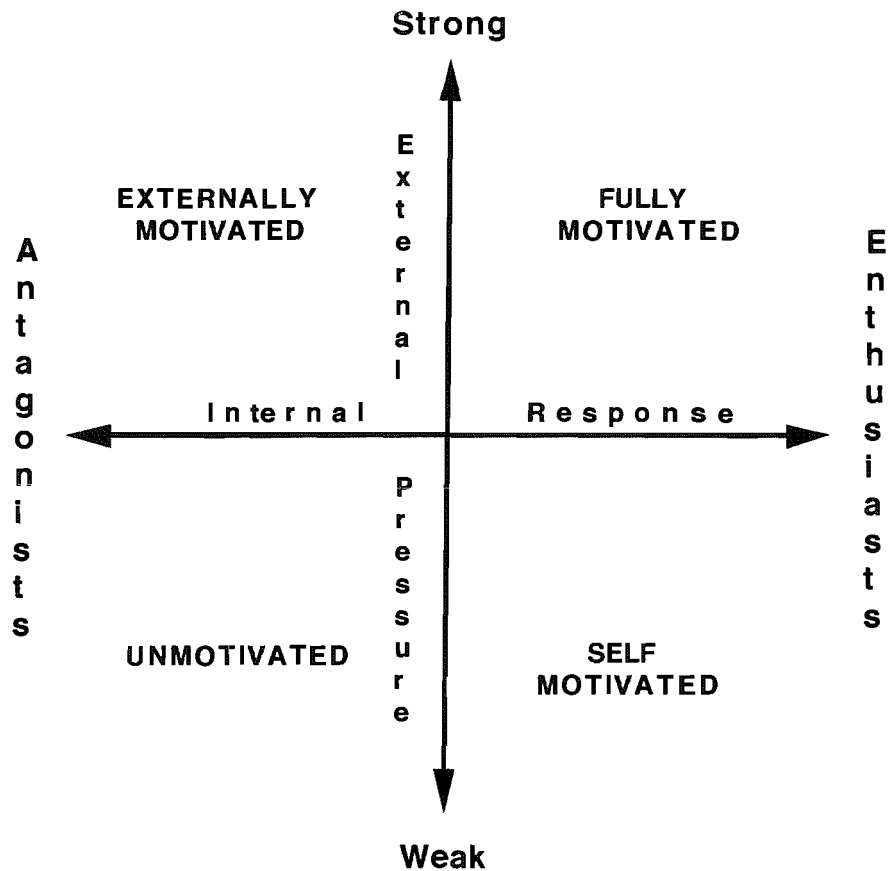
### 9.3.2 School Responses to Marketisation

This study has shown clearly the variation in response to marketisation across the case study schools, and has developed the IMCD as a descriptive tool to represent a school's overall response to the market. The extent of development of the IMCD is the product of two different groups of pressures - those emanating from beyond the school, and those from within the school which act as negative or positive influences on the adoption of a market culture. We might envisage these pressures as each representing a continuum. In the case of external pressures these might be seen as ranging from 'weak' to 'strong' depending on the influence of the factors portrayed in Figures 9.1, 9.2 and 9.3. The internal response continuum might be seen as stretching from positive to negative, too, with schools and staff, at one polarity, showing enthusiasm for the perceived educational, cultural and operational consequences of marketisation, or, at the other polarity, showing considerable negative attitudes to developments.

The existence of these two continua enables a model of marketing development to be identified, and this is illustrated in Figure 9.5. This enables a simple four-fold classification of school response to marketisation to be identified from the four areas defined by the two axes. The four categories identified are:-

- The Fully Motivated. This group represents those schools (or individuals) who are active and committed to marketing as a result of both external pressures and internal motivation. They are 'enthusiasts' in the context of strong external pressures
- The Externally Motivated. This group represents those schools who are driven by the pressures of the political and economic environment to actively engage with marketing, but are not motivated by personal enthusiasm or commitment.
- The Self-Motivated. This group comprises those schools where there is a positive enthusiasm for the marketing approach, despite the absence of substantial external driving forces

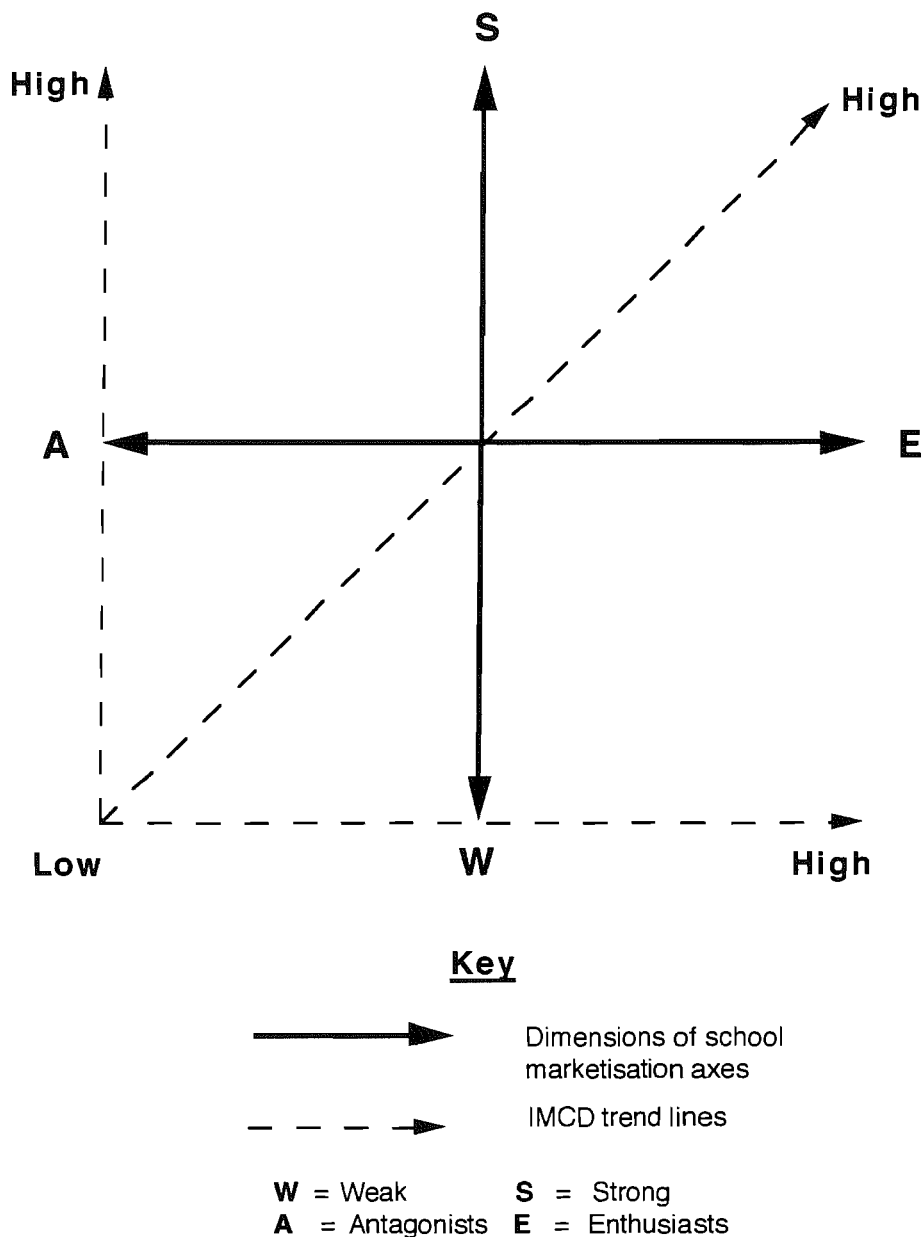
- The Unmotivated. The Unmotivated group consists of those schools who are neither interested in marketing nor driven significantly by the external forces to adopt a marketing perspective.



**Figure 9.5 Dimensions of school marketisation**

This model may be considered in the context of the case study schools. Within Manport, for example, the two schools studied both show a response to strong external forces, yet have quite different attitudes amongst their staff, with Hillview School staff and senior management representing a substantially more enthusiastic response to marketisation than colleagues at Bycars School. In Norbridgeshire the contrasting pressures and responses of The Abbey School, with its urban location, and Fenside School and Chalklands School with rural locations has been demonstrated in Chapter 8. In Alcheston, contrasts between Castle School and Downsview School on the one hand and The Lee School on the other echo those in Norbridgeshire. It is suggested that Hillview School and The

Abbey School might be categorised as 'fully motivated', while Bycars School is 'externally-motivated'. The other schools might be categorised as 'unmotivated', although their location within that quadrant of Figure 9.5 would place them near to the boundary with the 'externally-motivated' category. None of the case study schools appears to be in the 'self-motivated' category. However, the responses of the 'expert survey' schools suggest that some might be allocated to this group.



**Figure 9.6 Dimensions of school marketisation with IMCD superimposed**

Figure 9.6 extends the analysis to show the relationship between this typology and the Index of Marketing Cultural Development (IMCD). The pattern shows an increasing IMCD in all directions from the bottom left of the diagram, and enables a distinction to be made between schools which have similar patterns of development but whose motivation towards marketing is different. The precise dimensions of the relationship between IMCD and the four-fold typology needs further research, but it is clear that the typology provides a useful descriptive tool for a more sophisticated representation of cultural development than IMCD on its own.

## **9.4 Extending the Knowledge Base**

### **9.4.1 Generalisations and the Research Context**

The description and analysis that emerges from the previous sections provides a useful perspective on the development of marketisation. It is derived, however, from two methodological approaches which impose constraints on the generalisability of the conclusions that are reached, and these constraints need to be clarified.

The first constraint relates to the inherent nature of case study. Case study provides an in-depth analysis of structures and processes under the specified conditions of 'the case', but the very uniqueness of each case means that extrapolations to other situations and circumstances must, inevitably, be tentative. The uniqueness problem with case study has been partially challenged by the use of a multi-site study in the present research programme, with the concomitant reduction in detail that this inevitably entails being counter-balanced by the greater generalisability that emerges. What is of particular value is the identification of a range of factors which influence the precise nature of the case study, and it is the *prima facie* purpose of the range of conceptual models that have emerged from this study to do this. An interesting facet of case study in the context of marketing is the clear conclusion from the study in support of the concept of micro-markets. By definition this indicates the uniqueness of the operating circumstances of any individual school. It is intended, though, that this

study provides appropriate analytical frameworks for other similar studies to be undertaken.

The second methodological constraint relates to the use of the modified Delphi survey. The scale of the sample employed makes generalisation from the data inevitably somewhat tentative. The purpose of a full Delphi study is to validate ideas on the premise of the expertise of those consulted, rather than on the statistical validity of a suitable sample size. The present study did not, however, use the repeated questioning of experts, nor did it seek their responses to the generalisations drawn, both of which are normal stages in a full Delphi exercise. The results, nevertheless, paint a useful picture of practice in a small number of secondary schools in England and Wales. More particularly, the survey extends the generalisability of the ideas emerging from the case studies, and provides a yardstick with which to compare the case study data. The deployment of the “integrated case study - survey approach” has been intended to combine a broad overview of practice (the survey) with a detailed perspective (the case studies) and hence provide comparative data for effective critique of the ideas emerging from each element of the study. In this way it is believed that the conclusions are more widely generalisable than those uniquely from a case study, yet we need to be aware of the limitations of generalisability.

In general, therefore, a study at this scale can only provide tentative insights into practice, while seeking to extend the generalisability of the ideas as much as possible within these operational constraints. Inevitably what emerges are hypotheses for future research to test in a range of situations and environments. Nevertheless, it is contended that the study provides a range of valuable perspectives which substantially inform our understanding of the management of marketing in schools and the development of a marketing culture.

#### **9.4.2 Contributions to the Field of Education Marketing**

The analyses presented by this research provide a first objective insight into many of the dimensions of the research programme, and provide a primary knowledge base for future research. In particular, the study provides a clear view of the specific organisational and operational responses that schools have developed, and provides a measure of the scale of the development of a market culture in the case study schools. In some spheres, however, it also enables a critique and comparison with the existing knowledge base. This critique has been undertaken as part of the analysis in Chapters 6,7 and 8, but it is appropriate to consider some of the broader findings in comparison with existing understanding as considered specifically in Chapter 4.

The early empirical studies of Jones (1987), and Weindling and Earley (1987), provided a view of the changing perception of headteachers about the importance of external relations management. Jones' data dates from 1983, while Weindling and Earley's dates from 1986, and they demonstrate a growing awareness of issues. The present study demonstrates that this awareness has continued to develop into the 'expansion phase' of marketisation (see Chapter 1). In competitive environments this has stimulated an escalation of promotional activity, although in less competitive markets the speed of change is rather slower. The contrasts between Manport and Alcheston, for example, provide some evidence of this pattern of change. However, there is little evidence from the case study schools that there has been a parallel development of re-focused perspectives on the market place and external relations. In 1989 Williams identified that schools saw external relations mainly in terms of recruitment, with little genuine focus on client concern - a "product-focused" view of marketing. The case study schools and the expert survey schools suggest that for most schools there has been no large scale movement from this position, and the recognition of other perspectives of marketing (eg "quality" and client-focus) are still not well developed in a conscious link with markets and marketing. There is still substantial variation in the views that schools take of the requirements of markets, and while this is



partly explicable by variations in the nature of micro-markets, the evidence from this study suggests it is still largely rooted in the (mis!) understanding of markets and marketing by education professionals.

The studies of Riverway and Westway LEAs and the case study of Northwark Park School considered in Chapter 4 identified three specific areas of focus within the context of the present study - the specific nature and parameters of the market and the concept of micro-markets; the organisational response of schools to marketisation; and the cultural response of schools to these changes. The present study adds a number of perspectives in each of these areas.

Firstly, it is clear that the concept of the micro-market is an important one. Each of the case study schools demonstrates its own distinct market, characterised by a range of factors. These include the local socio-economic and political environment; local demographic change; the response of competitor schools; and a range of geographical and locational characteristics that are unique to each school. At a meso-scale, it is clear that urban and rural markets differ, and that the markets in large cities are less clearly defined than those in smaller towns - the Alchiston market is different to the Manport market, for example. In Alchiston, demographic growth and a predominantly middle class catchment area are key features of the market, while in Manport demographic loss due to suburbanisation, and a predominantly lower middle class and working class catchment are important features. At the micro-scale, the proximity of Castle School in Alchiston to the catchments of other schools along a main corridor of commuter residential development allows it access to a potential market that Downsview School cannot easily tap into. In Manport, Bycars School experiences losses into an adjacent LEA because of good transport links into that LEA and the dominantly middle-class ethos and image of the schools there.

Micro-markets are distinct and unique and therefore require individual, tailor-made responses from schools. The present study suggests that the recognition of this characteristic is not strong amongst

schools, and the need to research and understand the local market to generate an appropriate marketing strategy has not been recognised. Schools appear more concerned with doing what their neighbours do rather than developing their own marketing strategies - emphasising what Megson and Baber (1986) call the "Me-too" approach rather than the "Me-different" approach.

The second focus area is that of organisational response to marketisation. Bowe et al (1992) emphasise the lack of rational planning and the role of "ad hockery" in responding to market needs. The present study confirms this in a range of market contexts, with no greater evidence of rational planning in highly competitive markets than in those which are less competitive. Marketing is a low order priority within the organisational planning process, which is still dominated by internal curriculum issues. Where planning for marketing does occur, it is not integral to school development planning but tends to be "bolted on" to existing systems. This may, of course, be a reflection on the status of planning *per se* rather than on planning for marketing specifically.

A second dimension of organisation that emerges is that of consultation and collaboration in decision-making. The recognition in Riverway, Westway and Northwark Park of a move "back towards technocratic, hierarchical managerial styles" (Bowe et al (1992): 70) is reinforced by the present study. Marketing and the management of external relations is undertaken through a range of different operational structures (Figure 7.1), yet most are dominated by decision-making wholly within senior management. Consultation within the schools on marketing is not well-developed, and marketing is seen very clearly as something which senior managers do. This reflects some of the resource and time constraints in the system, but is clearly a retreat from the emphasis on collegiality which dominated the education management literature, if not practice, during the 1980s. How far this represents a change, of course, would warrant further research. Has the extra management demand of marketisation enabled the justification of management styles which had persisted through the 1980s at a time when they ran contrary to "good

practice" ? Has the market philosophy legitimised traditional managerial styles, rather than, as intended, stimulated new management philosophies and practices ?

The third area of organisation which emerged from the studies described in Chapter 4 was the relationship between innovation in marketing and promotional strategy and the strength of the competitive environment. The present study interprets this in a different way, for while innovation appears more likely in those schools experiencing greatest competition, it is clearly more related to specific circumstances. Within each of the three case study markets innovation varied from school to school. In Manport, Hillview School's innovations (enabling Year 6 pupils from feeder schools to use the swimming pool, for example) were not matched by Bycars School operating in the same environment. This reflects the views and attitudes of key personnel, for example between the new, young headteacher at Hillview School and the head approaching retirement at Bycars School. Similarly, in Alcheston, Castle School demonstrated more innovation than Downsview or The Lee School, despite operating in a similar marketing environment. It would appear that innovation in marketing is a product of many influencing factors, only one of which, although perhaps a very important one, is the competitive nature of the micro-market. The role of the personality of managers may be important, too, and a tentative, untested hypothesis for future research that emerged from the researcher's observations, relates to the different attitudes of men and women headteachers towards marketisation. Specifically, marketing is perceived as a 'macho' dimension of management, and the development of a high IMCD may be related to gender of senior managers. Furthermore, male heads may emphasise the competitive dimensions of marketing, while female heads may focus more on quality issues and customer needs.

The third area of consideration is the cultural response of schools to marketisation. The emphasis within previous studies has been on the cultural tensions for those working in schools between professional perspectives on education and the demands of the market place. The present study has enabled some clarification of the response to those

tensions, and identifies clearly a range of responses. Within each of the case study schools there are significant numbers of staff (30-40%) who have a positive perspective on the existence of educational markets, both within senior management groups and amongst a broad sample of staff. A further group feels able to respond to the demands of marketisation in a constructive way, despite having reservations about some of the consequences of competition. Strong opposition to marketisation is confined to a smaller group of staff. It may, of course, be argued that this demonstrates that teachers have been “captured by the discourse” of marketisation, but it may also reflect a perception of some of the gains that emerge from marketisation that can offset some of the losses that it brings. This is clearly a complex yet important research focus for the future.

A second dimension of cultural change is the issue of collegiality. The focusing of decision-making in relation to marketing with senior staff provides a potential schism in cross-staff collegiality, and this has been identified by Bowe et al (1992) and Gerwitz et al (1993). This divide emerges strongly from the case study schools in Alcheston, Manport and Norbridgeshire, but it is not a divide that has recently developed, for it appears to be an endemic characteristic of most of the schools. Representatives of the broad staff sample in each school are strongly aware of this divide, as one head of department, for example, indicates .....

“We are listened to, but I don’t know how much notice is taken. The ideas come from the top”

(Head of Art, Downsview School)

However, it is not clear that this is seen as a major criticism in terms of the effectiveness of the management of external relations - it is more a criticism of the management in relation to internal communications. Indeed, the lack of involvement in marketing planning is welcomed in some quarters, as a release from a further area of responsibility. With the increasing demands on teaching staff from curriculum change and issues such as inspection, staff may be happy to leave such responsibilities with senior colleagues. At The Abbey School in Norbridgeshire, for example, the headteacher

perceived that the staff were happy to let the senior management marketing group “get on with it” for they could see personal and institutional gains emerging which required little input from themselves.

A further aspect of collegiality relates to professional links between schools. Both Bowe et al (1992) and Gewirtz et al (1993) report the loss of professional contacts in schools as a result of competition, and this concern amongst teachers is confirmed by the observations in this study. The decline may be perceived as a gradual one, however, for the professional links are, in reality, personal links between individuals. Stepwise decline in the nature of such relationships tends to occur with personnel changes. In Manport, for example, the professional rift between Bycars School and Hillview School is identified by staff in both schools as dating from the appointment of the new head to Bycars. In Alcheston it is the newest headteacher in the initial survey (at Downsview School) who has the weakest links with the other schools, and this cannot be established more firmly now the relationship between the schools is competitive. The new headteacher at The Lee School, appointed in 1994, clearly sees a competitive relationship with the other schools, and sees little opportunity of establishing a more collegial relationship.

Overall, this study demonstrates that the marketing culture, as described in terms of understanding and practice, is not yet strongly developed in most of the case study schools. This supports the qualitative judgments that emerge from earlier studies, which suggest that the tensions inherent in change have not facilitated strong adoption of a marketing culture. This study also enables that analysis to be taken further by providing an analytical tool (IMCD) to consider the development of marketisation which allows both spatial and temporal variations in marketing culture to be identified and analysed.

## 9.5 Marketing Futures

### 9.5.1 Marketing - the Life Cycle of a Conceptual Product

The spatial and temporal development of marketisation reflects the “uptake” pattern of a new concept. This uptake is in large measure the result of government’s attempt to promote the concept of the market and their “call to consumerism” (Bowe et al (1994): 8). As Hatcher (1994) has suggested.....

“The market is not just a source of new material power for management, but.....also a legitimising discourse (which involves the socialisation of those in education into a new value system”

(Hatcher (1994): 55)

This has been illustrated by Mac an Ghail (1992), who portrays these new “values” as founded in organisational change (an emphasis on line management and devolution of responsibility), cultural change (an emphasis on customer orientation, innovation and enterprise) and individual responsibility (with an emphasis on managing individuals not collectives). We might visualise this as the “marketing of marketing”, in which the market and marketing are conceptual “products” that the government is seeking to sell. Whether this reflects a product-centred view or a client-centred view by government is clearly an interesting question for future research. The promotional tools employed in this process include the empowerment of parents, the development of the Parents Charter (DfE (1992)), and “ the characterisation of the ‘educational entrepreneur’ (which) takes self-interested behaviour to be a necessary virtue” (Ball (1993): 3-4).

If we conceptualise the market and marketing as a ‘product’ then we can consider its development in terms of the well-established market model of a Product Life Cycle (PLC) (Lancaster and Massingham (1988): 146-151). This sees the development of a product as passing through four

phases (introduction, growth, maturity and decline) as it enters the market place, replaces existing products, dominates the market and finally is replaced by a new “product”. It is not possible to indicate with accuracy where in such a model “marketing” as a product has reached, but we might hypothesise that it is in the growth phase as evidenced by the state of development of the marketing culture in the case study schools considered. The temporal development model utilised in Chapter 1 may be evidence to confirm this idea. Its future pattern of development is also open to debate, but we might predict that it will only survive as a central concept if the current political climate remains substantially unchanged, or if the concept itself is not replaced by a more attractive conceptualisation of the relationship between schools and their external environments.

It is suggested here that the maintenance of the concept in the mature stage of the PLC model for a substantial period of time before replacement will occur, for three principal reasons. Firstly, the rhetoric of choice and consumerism is increasingly universal across the mainstream political spectrum, and radical change to such key ideas seems unlikely in the near future even with a change of government. Secondly, parents might be seen to be locked into a positive feedback system of choice that they dare not seek to break out of. As Jonathan (1990) has suggested.....

“Once legislative change gives schooling a libertarian, consumerist context, the pressure is on parents to behave in their children’s interest, as if they endorsed such values, whether that is the case or not”.

(Jonathan (1990): 20)

Thirdly, it seems likely that teachers (and parents) will become increasingly captured by the discourse of the market and of consumption. The surveys in the case study schools suggest an acceptance by staff of the ‘inevitability’ and ‘necessity’ of marketing and an acceptance of a market-focused system. Mac an Ghail (1992) identified three groups of teachers in terms of their response to the market - the ‘professionals’, who accept the reality of their changing working conditions; the ‘old collectivists’ who

resisted the changes and opposed them wherever possible; and the 'new entrepreneurs', who perceived the opportunities of the market in a positive and enthusiastic way. The data in Figures 6.8, 6.9, 6.10 and 6.11 can be compared with these categories, with Category A being seen as equivalent to the "new entrepreneurs", Categories B and D together representing the "professionals", and category C representing the "old collectivists". Amongst senior staff (Figures 6.8, 6.9 and 6.10) 50% might be categorised as 'new entrepreneurs', while amongst the broad staff sample 36% fall into this category. Mac an Ghail suggests that about 38% of staff could be classified as 'new entrepreneurs'. This study suggests some evidence, therefore, that a significant proportion of staff in secondary schools have been "captured by the discourse".

Against this background it is difficult to see a decline of the marketing concept in the near future. However, the application of the idea of the Product Life Cycle provides some insights into its pattern of development and acceptance, and the long term potential for its decline and replacement.

### **9.5.2 Implications and Prospectives**

The analysis above raises a number of implications and presages some likely scenarios emanating from this persistence of marketing as an idea. Three specific issues will be considered here.

Firstly, the continued existence of quasi markets will see a continuing development of a market culture within secondary schools. The language and operation of the market place will become a more familiar element of the professional life of teachers, and more of the elements of the IMCD will shift from weakly to moderately to strongly established. The speed of this development will be controlled by the relative importance in each school of the internal and external filters in the process stage indicated in Figures 9.1 and 9.3.

Secondly, this cultural development will involve reflection upon the



nature and operation of markets. It is suggested here that this will lead to 'spectral drift' along the spectrum of understanding of marketing (Figure 6.14) towards a more differentiated perspective, and at the same time, as Kotler (1986) suggests, towards a more customer-focused view of marketing. A shift from a product-focused view to a customer-focused view has an important implication for schools, for it shifts the focus from promotion and selling to evaluation and marketing research. What is more, it brings the market needs of the school into synergy with the development of a total quality management perspective. Although TQM and quality assurance are new concepts within the school environment, and are subject to the natural resistance towards imported concepts that marketing has experienced, the idea of quality is much less contentious than the idea of competition. It challenges the conscience, morality and professionalism of educationists much less than the widely held view of marketing as 'selling'. It is suggested here that it will, therefore, find a home in schools much more readily.

The development of a customer-focused, quality based perspective will implicitly extend the external focus of the institution from senior colleagues through the whole staff. Quality is an issue that relates to the roles of all staff, and which is measurable in indicators that are acceptable within professional views of the role of teachers, such as enhanced performance, value added etc. Quality is also an issue that is substantially independent of the competitive nature of the marketplace, since it is a key concept for schools whether or not they are in strong competition with neighbouring schools. The pursuit of quality (however defined) is beneficial to the prime concern of most teachers, the pupils, in any market circumstances, and pushes schools to adopt a marketing perspective even in the absence of an active market place. In this way marketing may be seen as a function of a partnership relationship with parents based on "quality", "communication" and "accountability".

A third likely development will be a growing expertise in marketing amongst senior managers. Just as financial management and personnel management have become accepted as core skills for senior staff, so we

can expect that the skills of managing external relations will become a greater priority for training. This will be based, however, not on the imposition of marketing approaches from business, but on the marriage of concepts from business with perspectives and skills derived from the educational culture. The marketing managers of schools will not be imported from business but will be teachers and educationists who have developed their expertise within educational environments.

Along with this growing expertise will be two trends - the integration of marketing planning into whole school development planning, and a greater reliance on in-house, low-cost marketing research. The latter area will be facilitated by the growing sophistication of management information systems within schools, and by the development of low cost geographic information systems. The use of such systems has developed substantially in other public services (Martin (1991)), and also within the further education sector (Sanderson (1994)), and provides insights into the operation of local markets in a format and within resource constraints appropriate to most secondary schools. The growing autonomy of schools since the 1988 Education Reform Act requires access to a range of data to enable a full understanding of their operational environment, and such systems may provide appropriate data (Harvey (1995)).

## **9.6 Research Futures**

Section 9.4.1 has considered a number of issues relating to generalisations in the context of this case study research programme, and has emphasised that the main findings of the study must be regarded as hypotheses for future testing. It is appropriate, therefore, to conclude this thesis with a consideration of future research directions.

The research agenda within the field of markets in education has focused on two main areas to date - philosophical reflection on the nature and validity of the market concept within education (eg Chubb and Moe (1989); Jonathan (1990); Thomas (1994)), and the demand side of the market in the context of parental choice and decision-making (eg MacBeth

et al (1986); Stillman and Maychell (1986); Adler, Petch and Tweedie (1989); Ball, Bowe and Gewirtz (1995)). The present study has taken a supply-side view of markets by focusing on the management and cultural dimensions of marketing in secondary schools. A number of directions for the research future emerge from this.

Firstly, there is a need to consider the supply side in a wide range of operational environments. In particular there is a need to examine school responses in different socio-economic and geographical environments. For example, the operation of markets with uniform provision (eg mixed comprehensive schools) may be different from those with a diversity of provision. The impact of enhanced choice and differentiation in localities with grant maintained schools or city technology colleges on the strategic response of schools needs research consideration, as does the comparison of marketing practice and organisation between GM schools, CTCs and LEA schools. The role of LEA LMS funding formulae on marketisation is a further area for consideration.

From such an accumulation of descriptive data it will be possible to refine our understanding of the management of marketing in schools. This will facilitate the second research direction, which is the testing of the conceptualisations in the present study in a range of contexts. While it is believed that they contribute a significant insight in the field, they are clearly subject themselves to challenge, to refinement or to replacement, from both theoretical and empirical perspectives.

Thirdly, there is a need to test the philosophical considerations on markets in the context of experience. As markets, or quasi-markets, have a longer existence, so the realities of the positive and negative criticisms of the concepts will become clear. While this may portray marketisation as a huge social experiment, we can clearly gain insights from seeing it in practice. In particular, the concerns outlined in Chapter 2 in relation to, for example, egalitarian issues or the negative consequences of marketisation on the creation of 'sink' and 'magnet' schools, need review in the light of

accumulated experience.

Fourthly, it is essential that we pursue an holistic view of educational markets. As indicated earlier the demand and supply sides of the market are not independently formed and have major influence upon each other. For example, the practice of schools in promotional methods may have substantial influence on the criteria parents use to make decisions, and in this way the suppliers will be 'forming' the market. Similarly, parental behaviour will itself drive the ways schools operate in the market place. There is clearly a need for studies which bring together both sides of this process, and emphasise the integral and interactive forces at work. This needs to be undertaken at both the micro-scale, through ethnographically-based studies, and at the macro-scale through survey. The prize is an integrated model of the operation of education markets.

Fifthly, we need to examine marketisation as a dynamic, developmental process and to consider it in the context of models of change in social and organisational arenas. More specifically, the combination of the introduction of a new concept and approach (marketing) and the observation of the dynamic pattern of their adoption and implementation suggests a productive comparison might be made with the models of diffusion of innovation that have been developed within the social sciences (eg Rogers and Shoemaker (1971); Rogers (1983)).

Rogers and Shoemaker suggest that an innovation passes into a system through....

"... three sequential steps : (1) invention, (2) diffusion, (3) consequences. Invention is the process by which new ideas are created or developed. Diffusion is the process by which these new ideas are communicated to the members of the social system. Consequences are the changes that occur within a social system as a result of the adoption or rejection of the innovation"

(Rogers and Shoemaker (1971): 32)

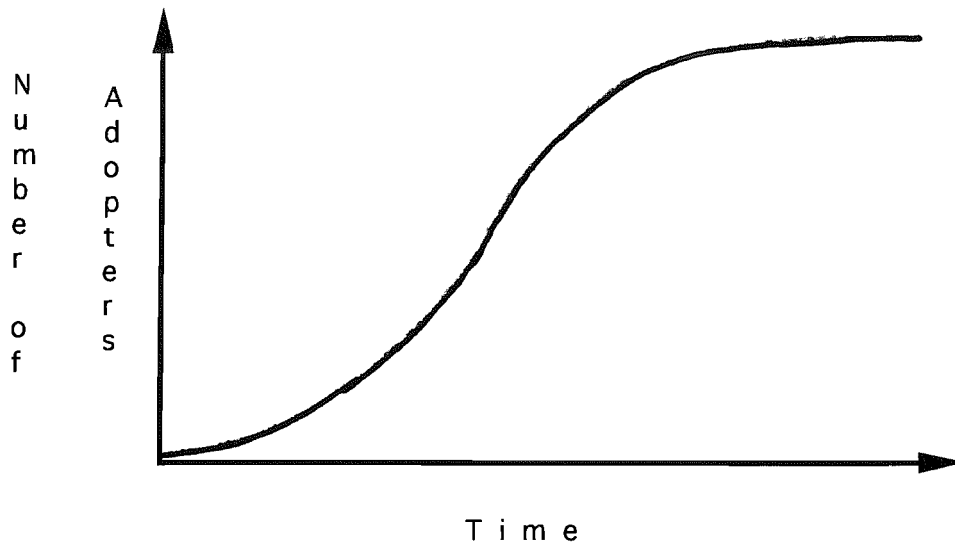
The process of 'diffusion' has apparently strong analogies to the processes considered in the current study. The 'consequences', for example, have been examined in terms of the observable cultural and operational developments in schools, and the 'invention' process has been seen in the ideological and political roots described in Chapters 1 and 2. Furthermore, Rogers (1983) identifies an absence of motivation as the key barrier to diffusion, and has developed the concept of motivation to identify a continuum of dispositions towards innovation which reflect the temporal pattern of uptake of an innovation (Figure 9.7). The relationship between these dispositions and the four-fold typology of motivation developed here in Figure 9.5 needs further consideration.

Finally, we must be aware that education is not the only public sector arena in which quasi-markets have developed, and there will be value in comparative studies of such markets. In particular, the operation of health services in this environment has generated insights which might usefully be shared, while education perspectives might inform analysis elsewhere.

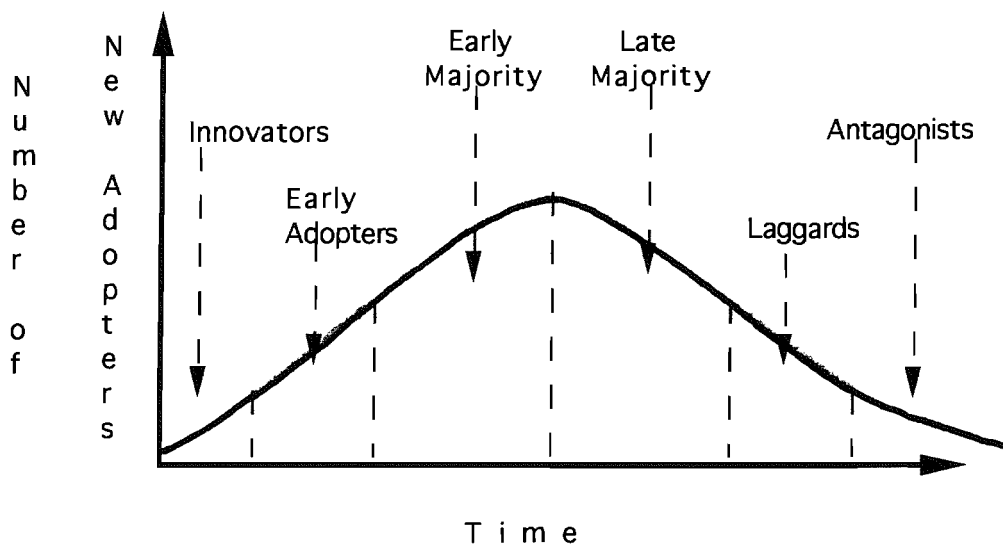
Overall, therefore, it is clear that education markets and marketing provide a rich research arena for the coming decade. In particular, if the concept of the market is to remain as the central organisational and operational tenet of the public service sector, then its mechanisms, consequences, opportunities and threats need to assume a prominent position in research in the social sciences in general and education in particular.

## **9.7 Summary**

This study has focused on a number of aspects of the functioning of secondary schools within the new education quasi-market. Section 9.2 has described the main conclusions from each element of the study, and has enabled a model of the marketisation process to emerge (Figures 9.1 to 9.4). This multi-factor process model provides a first description of how schools progress to the state of development that is observable in practice,



a) The 'S-shaped' diffusion curve



b) Stages in the adoption of an innovation (after Rogers (1983))

Figure 9.7 The diffusion and adoption of an innovation

measurable using the IMCD, and visualised in the four-fold typology in Figure 9.5. Overall the study has developed a picture of marketisation which suggests highly variable practice in schools based on a reactive, non-rational approach to planning. Marketing in the schools of England and Wales appears still to be developing rapidly, with little evidence of a stable national pattern of practice or of cultural conformity. The engagement with markets has progressed from initiation to the “take-off” phase, and further research will be necessary to track the rapid development which seems inevitable in the remaining years of this decade.

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**APPENDIX**  
**1**

**Assignment for Masters' Students**

Assignment

The Task

The assignment is the production of a small-scale and partial External Relations Audit of your own institution. Guidance on this task will emerge from Session 2 on "Planning External Relations", but the following may prove helpful:-

- \* The task should be tailored to the scale of a 2500 word assignment, and should not attempt to be a full audit exercise.
- \* It is intended to be an analysis of where your institution is at in terms of its external relations activities, and , at this stage, cannot extend to a full ER Plan.
- \* If your institution is large you may wish to focus on one part of the institution eg one Faculty, or, in an FE Institution, one department.
- \* This exercise clearly depends on the cooperation of senior staff in your institution, and ought to have some payoff for them. However, if you discover or feel that it will be inappropriate or impractical to undertake this work with their cooperation, then please discuss the issue with me **AT AN EARLY STAGE**
- \* Your Report should be about **2500 words** in length. The majority of this should be your analysis of the current ER situation and your proposals for development.

The Assessment Criteria

A **Satisfactory** assignment will:-

- \* Demonstrate the use of a logical approach to ER auditing
- \* Justify the use of appropriate methods within the audit
- \* Present the results of the audit in a clear and appropriate manner
- \* Provide thoughtful and critical comment upon ER in the institution. This will reflect wide reading of the literature on External Relations in Education.
- \* Include a critique and proposals which demonstrate an understanding of management structures and issues in educational organisations
- \* Have a high standard of presentation
- \* Be appropriately referenced and include a Reference List

The Deadline

Your assignment should be handed in by **Friday 19th March**.

**N. Foskett**



**APPENDIX  
2**

**Letter to Headteachers requesting participation**



The Headteacher,  
Castle School,  
Vale Road,  
Alcheston  
AL61 1AB

date

Dear Mr Jones,

I am writing to ask if you would be willing to assist me with a research project which I am embarking on. The project is in the field of educational marketing and external relations management, and stems from my existing research in this area, which has supported the MA(Ed) course unit I teach and my book ("Managing External Relations in Schools"), published by Routledge.

The aim of the project is to look at the management of marketing in schools with particular reference to the structures (both organisational and operational) that are being established to manage marketing and other external relations activities. My reason for seeking the involvement of yourself and your school is my wish to focus the work on a case study of a specific marketing environment. Specifically, I believe that Alcheston and its immediate catchment area provides an example of a competitive environment that is as close to being a "closed system" as it is possible to find. While I appreciate that your own school has a substantially larger "catchment" than the maintained schools in the town, I believe it would be enormously valuable to the research for you to be included. I hope, therefore to undertake the study with reference to CastleSchool, Eastville School, Downsview School, and The LeeSchool.

In general terms the project would involve research spread over the coming academic year. I would hope to spend time in each school looking at...

- \* The current range of marketing and external relations activities
- \* The organisational structures employed in the school to support those activities
- \* The effectiveness of the range of strategies employed in this field
- \* The responses of the school (governors, senior management, teaching staff,

support staff, parents and pupils) to the new range of external relations / marketing challenges that have arisen in the last few years. I would estimate at this stage that this would involve me in working in the school for, in total, some 5-15 days over the coming year.

I believe this research has much to contribute to a wider understanding of marketing in schools. It is the first such project nationally aimed at identifying what actually happens rather than what, theoretically, ought to be happening in the management of marketing in schools. I recognise that the project focuses on a comparatively "sensitive" area, particularly since it will be examining all the partners in a specific competitive environment, but I would emphasise from the outset the total confidentiality of my work in each school. The conclusions will be published initially in my own doctoral dissertation, and may in turn lead to appropriate academic papers. However, with the consent of the schools involved, I would foresee the possibility of formal publication of the research as a book. I believe the work has much to offer each participating school, too, in that my observations and thoughts stemming from my work within the school will be made readily available to the school itself.

I hope you feel able to consider this proposal. I shall telephone you in a few days to discuss the proposal, and I shall be delighted to make an initial visit to talk with you prior to any specific commitment from the school.

Yours sincerely,

(N.H.Foskett)

(Lecturer in Education)



**APPENDIX**  
**3**

**Headteacher Interview Schedule**

## Headteacher Interview Schedule

### **A. Perceptions of Marketing**

1. What do you understand by the terms “marketing”, “public relations”, “external relations”, “promotion” ?
2. What is your **personal** view of the place of marketing in education ?
3. How far is that view modified or constrained by practical realities ?
4. How important is marketing relative to the other management functions of the school ?

### **B. Organising for Marketing**

5. How has the school's policy and philosophy on marketing changed in the last five years ?
6. Does the school have a Marketing Plan ?
7. How far does marketing appear in the School Development Plan ?
8. How is the marketing activity of the school organised in terms of.....
  - a) Who plans the marketing ?
  - b) How is that planning undertaken ?
  - c) Who implements the marketing plans ?
  - e) How is the marketing activity evaluated ?
9. What is the role of each of the following in the school's marketing ?
  - a) Head
  - b) Deputies
  - c) Pastoral Heads
  - d) Academic Heads
  - e) Main Teaching Staff
  - f) Support Staff ?
10. What experience is there of “training” for marketing on the school staff
  - a) Amongst senior management
  - b) Amongst other teaching staff
  - c) Amongst support staff ?

(Continued.....)

(..... Continued)

11. What are the current problems in developing a marketing strategy
  - a) From constraints within the school
  - b) From constraints outside the school ?
12. How is the budget for marketing activities calculated and allocated ?
13. Who holds the budget(s) for marketing activities ?

### **C. The Practice of Marketing**

14. What marketing research has been undertaken in / by the school ?
15. What marketing methods are used by the school ?

### **D. The Future of Marketing**

16. How do you see marketing in the school developing over the next decade ?



**APPENDIX**  
**4**

**Staff Sample Interview Schedule**

## STAFF SAMPLE INTERVIEW SCHEDULE

INTERVIEWEE  
SCHOOL

POST  
DATE / TIME

---

### INTRODUCTION

The purpose of this research project is to examine how schools in the Alcheston area are operating in terms of Marketing. I have spoken with members of the SMT, but wish to discover how other colleagues see the school's work in this field and its approach to marketing. I want to ask you a series of questions in a number of areas.

### A. ABOUT YOUR OWN VIEWS ON MARKETING AND EXTERNAL RELATIONS

1. What do you understand by each of the following terms?

a) MARKETING

b) PUBLIC RELATIONS

c) EXTERNAL RELATIONS

d) PROMOTION

2. Marketing is a term we hear more frequently in schools nowadays. How do you feel personally about this growth of marketing activity in schools ?

3. How important do you feel marketing is to the well-being of the school ?

### B. ABOUT YOUR OWN SPECIFIC RESPONSIBILITIES IN THIS AREA

1. What duties and responsibilities do you have in the fields of marketing ?

2. How important do you feel your work is within the whole school's marketing activities ?

3. What could be done to increase your effectiveness in those duties ?

4. What training, if any, have you had for those duties and responsibilities ?

**C. ABOUT YOUR SCHOOL'S CURRENT MARKETING ACTIVITIES**

1. How much discussion of marketing issues takes place in the following spheres ?

a) On school INSET days

b) In departmental / Faculty meetings ?

c) In whole staff meetings ?

d) Informally amongst the staff ?

(e) (for governors) In governors meetings ?

2. How much influence does the staff as a whole have on the formulation of school policy in marketing and ER ?





**APPENDIX**  
**5**

**Letter to Parents**

Dear Parent,

**Marketing in Secondary Schools Project**

I am currently undertaking a programme of research which is looking at the way schools market themselves to the community. As part of this study I have been working in close cooperation with several secondary schools in this area, including your child's school, and I have the Headteacher's agreement to approach you on this matter. An important part of the study is to examine how the pupils in the study schools and their parents view the school and its external "face", and I have therefore obtained the school's agreement to ask a number of questions of a small sample of pupils and their parents. Your child's tutor group has been selected as that sample.

May I ask you, therefore, if you would be willing to complete the enclosed questionnaire and return it, sealed in the envelope provided, to your child's group tutor in the next day or two. The individual replies are **entirely confidential** to me and will not be seen by anybody in the school at any time. They will simply be used to provide a general idea of parental views. May I thank you in advance for your help and for your time in completing the questionnaire.

Yours sincerely,

(N.H.Foskett)

(Lecturer in Education)



**APPENDIX**  
**6**

**Pupil Questionnaire**

# Marketing in Secondary Schools Project

## Pupil Questionnaire

Please write the name of your school here: \_\_\_\_\_

Please work through the questions below thinking carefully about your answer to each one.

### Question 1

Think of the time when you and your parents were thinking about which school you should go to when you left primary school. Please put a tick next to one answer below to show how many schools you thought about before making your choice.

- a. We only thought about coming to this school \_\_\_\_\_
- b. We decided between this school and one other school \_\_\_\_\_
- c. We considered several different schools before choosing this one \_\_\_\_\_

If you ticked (b) or (c) above, please write down in the spaces below the names of the schools other than this one that you considered.

- 1.
- 2.
- 3.

### Question 2.

Which schools did you visit with your parents before choosing the school that you wanted go to ?

### Question 3.

Who made the choice of which school you should go to ? (Please put a tick next to your chosen answer)

- a. My parents \_\_\_\_\_
- b. My parents, although they listened to my views \_\_\_\_\_
- c. Mainly my own choice \_\_\_\_\_
- d. My parents and me both liked the same school \_\_\_\_\_

**Question 4.**

From where did you find out your information about the school when you were making your choice ? Against each source of information put a tick to show whether you got a lot of information, some information or no information from there.

	<u>A LOT</u>	<u>SOME</u>	<u>NONE</u>
a. From my Primary School Class Teacher	_____	_____	_____
b. From my Primary School Headteacher	_____	_____	_____
c. From this school's booklet or brochure	_____	_____	_____
d. From older brothers or sisters	_____	_____	_____
e. From older friends	_____	_____	_____
f. From articles in the local paper	_____	_____	_____
g. From a visit to the school	_____	_____	_____
h. From the school's Open Day	_____	_____	_____
i. From my parents	_____	_____	_____
j. From a talk at my primary school by someone from the secondary school	_____	_____	_____
k. From somewhere else (Please write here where else you got information from _____)	_____	_____	_____

**Question 5.**

Below is a list of reasons why you or your parents might have chosen the school you should go to. For each reason , write one of the following letters next to it:

A = I thought the school was very good for this

B = I thought the school was “alright” for this

C = I thought the school was not very good for this

1. Examination results \_\_\_\_\_
2. Nice buildings \_\_\_\_\_
3. Nice grounds \_\_\_\_\_
4. Happy pupils \_\_\_\_\_
5. Good teachers \_\_\_\_\_
6. The school’s reputation \_\_\_\_\_
7. Sports activities \_\_\_\_\_
8. Music activities \_\_\_\_\_
9. Plays and concerts \_\_\_\_\_
10. Pupils’ behaviour \_\_\_\_\_
11. Friendly staff \_\_\_\_\_
12. Pupils are made to work hard \_\_\_\_\_
13. Convenient location \_\_\_\_\_
14. Nearest school to my home \_\_\_\_\_

**Question 6.**

Now I would like you to do the same for each of the other schools you thought about going to. Write the name of the school at the top of one of the columns below, then fill in your answers below it. Remember that for each reason you should write one of the following letters next to it:

A = I thought the school was very good for this

B = I thought the school was "alright" for this

C = I thought the school was not very good for this

	<b>SCHOOL ?</b>	<b>SCHOOL ?</b>	<b>SCHOOL ?</b>
	-----	-----	-----
1.	Examination results_____	_____	_____
2.	Nice buildings _____	_____	_____
3.	Nice grounds _____	_____	_____
4.	Happy pupils _____	_____	_____
5.	Good teachers _____	_____	_____
6.	The school's reputation_____	_____	_____
7.	Sports activities _____	_____	_____
8.	Music activities _____	_____	_____
9.	Plays and concerts _____	_____	_____
10.	Pupils' behaviour _____	_____	_____
11.	Friendly staff _____	_____	_____
12.	Pupils are made to work hard _____	_____	_____
13.	Convenient location _____	_____	_____
14.	Nearest school to my home _____	_____	_____

**Question 7.**

Now that you have been here for nearly a year, what would you say to pupils in your old primary school about this school ? Write down below three good things and three things that are not so good about this school

**“GOOD” THINGS**

1

2

3

**“NOT SO GOOD” THINGS**

1

2

3

**Question 8.**

For each of the statements in the list below, put a tick in the box next to it that best indicates your feelings about it

<u>STATEMENT</u>	<u>AGREE</u>	<u>AGREE</u>	<u>DISAGREE</u>	<u>DISAGREE</u>
	<u>STRONGLY</u>	<u>A LITTLE</u>	<u>A LITTLE</u>	<u>STRONGLY</u>
1. OVERALL I THINK THE SCHOOL IS A VERY GOOD ONE	_____	_____	_____	_____
2. OVERALL I ENJOY BEING AT THIS SCHOOL	_____	_____	_____	_____
3. I WOULD RECOMMEND THIS SCHOOL TO PUPILS AT MY PRIMARY SCHOOL	_____	_____	_____	_____

**THANK YOU FOR YOUR HELP WITH THIS QUESTIONNAIRE**





**APPENDIX  
7**

**Parent Questionnaire**

# Marketing in Secondary Schools Project

## Parent Questionnaire

PLEASE WRITE THE NAME OF YOUR CHILD'S SCHOOL BELOW

-----

### Question 1.

(Please place a tick next to your answer)

When you were thinking about which secondary school you should choose for your son / daughter did you:-

- a. Only consider the school he/she now attends \_\_\_\_\_
- b. Choose between this school and one other school \_\_\_\_\_
- c. Choose between several different schools \_\_\_\_\_

If you ticked (b) or (c) above, please write down the names of the schools (either state maintained schools or independent schools) other than the one your daughter / son now attends that you considered.

- 1.
- 2.
- 3.

### Question 2.

Which schools did you visit before making your choice of secondary school ?

**Question 3.**

(Please tick to indicate your answer)

Who made the choice of secondary school for your son / daughter ?

- a. I /we did \_\_\_\_\_
- b. I / we did, although our son's / daughter's views were listened to. \_\_\_\_\_
- c. Mainly our son's / daughter's choicechoice \_\_\_\_\_
- d. I / we liked the same school as our son / daughter \_\_\_\_\_

**Question 4.**

Where did you find out information about the school when you were making your choice ? Please indicate by ticking the appropriate answer how much information you got from the following sources

	<u>A LOT</u>	<u>SOME</u>	<u>NONE</u>
a. From your son's / daughter's Primary School Class Teacher	_____	_____	_____
b. From the Primary School Headteacher	_____	_____	_____
c. From the secondary school's booklet or brochure	_____	_____	_____
d. From brothers or sisters experiences at the secondary school	_____	_____	_____
e. From friends / colleagues	_____	_____	_____
f. From articles in the local paper	_____	_____	_____
g. From a personal visit to the school	_____	_____	_____
h. From the school's Open Day / Open Evening	_____	_____	_____
i. From parents of other children at the primary school	_____	_____	_____
j. From parents of other children at the secondary school	_____	_____	_____
k. From a talk at the primary school by someone from the secondary school	_____	_____	_____
l. From another source (Please specify.....)	_____	_____	_____

**Question 5.**

Below is a list of reasons why you might have chosen the school your child goes to. For each reason, write one of the following letters next to it:

A = I / we thought the school was very good for this

B = I / we thought the school was "alright" for this

C = I / we thought the school was not very good for this

D = I had no clear idea about this

- 1. Academic Character \_\_\_\_\_
- 2. Examination Results \_\_\_\_\_
- 3. Traditional Teaching Approach \_\_\_\_\_
- 4. Modern teaching Approach \_\_\_\_\_
- 5. Attractive Buildings \_\_\_\_\_
- 6. Attractive Campus \_\_\_\_\_
- 7. Happy Pupils \_\_\_\_\_
- 8. Well-dressed pupils \_\_\_\_\_
- 9. Satisfied Parents \_\_\_\_\_
- 10. Effective Head \_\_\_\_\_
- 11. Good Teaching Staff \_\_\_\_\_
- 12. Improving Reputation \_\_\_\_\_
- 13. Good Media Image \_\_\_\_\_
- 14. Strong Sporting Activities \_\_\_\_\_
- 15. Strong Drama Activities \_\_\_\_\_
- 16. Strong Music Activities \_\_\_\_\_
- 17. Good Pupil Discipline in School \_\_\_\_\_
- 18. Good Pupil Discipline out of School \_\_\_\_\_
- 19. Successful with able pupils \_\_\_\_\_
- 20. Successful with less able pupils \_\_\_\_\_
- 21. Friendly Staff / pupil Relationships \_\_\_\_\_

**Question 6.**

Now I would like you to do the same for each of the other schools you thought about sending your son / daughter to. Write the name of the school at the top of one of the columns below, then fill in your answers below it. Remember that for each reason you should write one of the following letters next to it:

- A = I thought the school was very good for this
- B = I thought the school was "alright" for this
- C = I thought the school was not very good for this
- D = I had no clear idea about this

	-----	-----	-----
1. Academic Character	_____	_____	_____
2. Examination Results	_____	_____	_____
3. Traditional Teaching Approach	_____	_____	_____
4. Modern teaching Approach	_____	_____	_____
5. Attractive Buildings	_____	_____	_____
6. Attractive Campus	_____	_____	_____
7. Happy Pupils	_____	_____	_____
8. Well-dressed pupils	_____	_____	_____
9. Satisfied Parents	_____	_____	_____
10. Effective Head	_____	_____	_____
11. Good Teaching Staff	_____	_____	_____
12. Improving Reputation	_____	_____	_____
13. Good Media Image	_____	_____	_____
14. Strong Sporting Activities	_____	_____	_____
15. Strong Drama Activities	_____	_____	_____
16. Strong Music Activities	_____	_____	_____
17. Good Pupil Discipline in School	_____	_____	_____
18. Good Pupil Discipline out of School	_____	_____	_____
19. Successful with able pupils	_____	_____	_____
20. Successful with less able pupils	_____	_____	_____
21. Friendly Staff / pupil relationships	_____	_____	_____

**Question 7.**

Now that your daughter / son has been at the school for nearly a year, what would you say to other parents making secondary school choices about the school your son / daughter now attends ? Please write down below three good things and three things that are not so good about the school

**“GOOD” THINGS**

1

2

3

**“NOT SO GOOD” THINGS**

1

2

3

**Question 8.**

For each of the statements in the list below, please put a tick in the box next to it that best indicates your feelings about it

STATEMENT	AGREE STRONGLY	AGREE A LITTLE	DISAGREE A LITTLE	DISAGREE STRONGLY
1. OVERALL I THINK THE SCHOOL IS A VERY GOOD ONE	_____	_____	_____	_____
2. OVERALL MY CHILD ENJOYS BEING AT THIS SCHOOL	_____	_____	_____	_____
3. OVERALL I WOULD RECOMMEND THE SCHOOL TO OTHER PARENTS	_____	_____	_____	_____

**Question 9.**

Please read the following statements about the relationship between schools and the community. Please indicate with a tick your feelings about each statement.

STATEMENT	AGREE STRONGLY	AGREE A LITTLE	DISAGREE A LITTLE	DISAGREE STRONGLY
1. Marketing is not something schools should engage in. It should be up to parents to find out what they wish to know for themselves	_____	_____	_____	_____
2. The idea of marketing by schools is in opposition to the whole idea of education	_____	_____	_____	_____
3. Parents have a right to choose their child's school, and marketing by schools gives them useful information to make their choices	_____	_____	_____	_____
4. Competitive marketing between schools sharpens up their concern for how they operate and for meeting parental wishes	_____	_____	_____	_____
5. Only those schools that market themselves strongly will survive	_____	_____	_____	_____
6. Schools should spend their money on the pupils, not on marketing activities.	_____	_____	_____	_____
7. "Word-of-mouth" is the best form of advertising - schools should concentrate on good teaching and good results and these will speak for themselves without the need for marketing	_____	_____	_____	_____
8. A little "publicity" is a good thing for a school, but strong marketing is inappropriate.	_____	_____	_____	_____
9. Marketing is a part of all businesses and services, and is just as appropriate in schools	_____	_____	_____	_____
10. Marketing by schools is not a good thing, but is essential in the current climate	_____	_____	_____	_____

**Question10**

Please indicate by ticking the appropriate boxes below who has completed this questionnaire

Father	_____	Age Range	Less than 30_____	45-49 _____
Mother	_____		30-34 _____	50 or above_____
Guardian (Male)	_____		35-39 _____	
Guardian (Female)	_____		40-44 _____	

Occupation of the Head of Household \_\_\_\_\_

**THANK YOU FOR YOUR HELP WITH THIS QUESTIONNAIRE**





**APPENDIX  
8**

**'Expert' Survey Questionnaire**

## Marketing in Secondary Schools Project

### "Delphi" Questionnaire

#### QUESTION 1

Please provide the following descriptive information about your school

a) Name of the school \_\_\_\_\_

b) Age range of school (eg 11-16) \_\_\_\_\_

c) Type of school (eg mixed comprehensive \_\_\_\_\_  
/ girls grammar)

d) Designation of school (eg LEA / \_\_\_\_\_  
GM / Independent)

e) Current roll \_\_\_\_\_

f) DFE Standard Number \_\_\_\_\_

g) Number of "out of catchment" children \_\_\_\_\_  
in 1992/3 intake

h) Please tick one of the following to indicate the trend of intake of pupils over the next five years **without** marketing the school:-

Increasing rapidly \_\_\_\_\_

Increasing slowly \_\_\_\_\_

Stable \_\_\_\_\_

Declining slowly \_\_\_\_\_

Declining rapidly \_\_\_\_\_

i) Name and status of person completing this questionnaire

\_\_\_\_\_

## **QUESTION 2**

**Marketing, public relations, external relations and promotion are all terms used increasingly in education management.**

**Please indicate briefly below what you understand by each of these terms**

**MARKETING**

**PUBLIC RELATIONS**

**EXTERNAL RELATIONS**

**PROMOTION**

### QUESTION 3

#### How is the management of marketing in your school organised ?

Please tick as many of the following as appropriate.

- a) The Head consults but takes the lead in all policy making and external relations activities \_\_\_\_\_
- b) A Deputy Head (or very senior member of staff) takes responsibility for marketing and external relations, but this is not a major part of his/her role \_\_\_\_\_
- c) A Deputy Head (or very senior member of staff) takes responsibility for marketing and external relations, and this is a major responsibility that he/she undertakes \_\_\_\_\_
- d) Marketing / external relations is coordinated by a colleague not on the senior management team \_\_\_\_\_
- e) A committee (working group) of a cross-section of staff plans the operation of marketing within a policy framework set by senior management / the Head \_\_\_\_\_
- f) A committee (working group) of a cross-section of staff plans the operation of marketing and has substantial influence on policy making by the Head / SMT \_\_\_\_\_
- g) The Governing Body has a sub group (working group) which plays an important role in marketing policy \_\_\_\_\_
- g) Policy and practice in marketing is organised in another way (please specify) \_\_\_\_\_

#### QUESTION 4

**How far is marketing an integral part of school planning ?**

Please tick as many of the following as appropriate

- a) The school has a development plan \_\_\_\_\_
  
- b) The school development plan (SDP) covers marketing issues  
in a few places but not as a separate field \_\_\_\_\_
  
- c) Marketing has a high profile within the SDP \_\_\_\_\_
  
- d) The school has a separate marketing plan \_\_\_\_\_
  
- e) Marketing and external relations issues are an overt part of  
the planning process undertaken by Heads of  
Department / pastoral Heads \_\_\_\_\_
  
- f) Marketing is planned "event by event" \_\_\_\_\_

NB It would be of great value to the research if a copy of any Staff Development Plan (or the elements of it that refer to marketing and external relations) or Marketing Plan could be attached to this questionnaire. You may be assured of its **absolute** confidentiality.

## QUESTION 5

**Why has the school developed the marketing practice and policy that now operate ?**

Please tick as many of the following statements as are appropriate.

If you tick more than one item, please use the right hand column to indicate the order of importance of the items (1=most important, 2= second most important etc)

**(TICK(✓))RANK**

- a) There are a number of legal obligations to provide information to parents and the media \_\_\_\_\_
- b) Other schools are marketing themselves quite aggressively \_\_\_\_\_
- c) The personality of the Head / Senior Management Team means that public image is an important element of the school's character \_\_\_\_\_
- d) The school has always publicised its successes and strengths \_\_\_\_\_
- e) The management role of the Head/ Senior Management means that marketing is a key element in their work \_\_\_\_\_
- f) Marketing is an attempt to identify and satisfy the needs of parents and pupils \_\_\_\_\_
- g) Marketing is intimately linked to the pursuit of quality in all facets of the school's work, and requires all staff to focus on quality in what they do \_\_\_\_\_
- h) It is an enjoyable aspect of management \_\_\_\_\_
- i) Marketing is a new activity we have had to become concerned with since parental choice of schools became a reality \_\_\_\_\_
- j) Other reasons (please specify) \_\_\_\_\_

## QUESTION 6

**What experience of training in the field of external relations and marketing do key staff have ?**

Please tick the appropriate answers under each column. Leave blank if answer not known.

	Headteacher	Colleague with responsibility for marketing	Key * Governor
a) Industrial / commercial experience of marketing	_____	_____	_____
b) Attended a short course on marketing (eg 1 day course)	_____	_____	_____
c) Attended a long course on marketing (eg weekend, diploma etc)	_____	_____	_____
d) Read books on school marketing	_____	_____	_____
e) Attended management course including marketing (eg Head's induction, governor training)	_____	_____	_____
f) Attended long course on management including marketing (eg MA(Ed), MBA)	_____	_____	_____

\* The "Key Governor" is that governor who is most influential in terms of marketing practice in the school. It may or may not be the Chair of Governors.

## QUESTION 7

**What staff development activities have been organised to support marketing in the school ?**

Please tick as many of the following as appropriate

- a) One or more teaching staff have attended courses on marketing \_\_\_\_\_
- b) At least one whole-school training day has considered marketing in the school \_\_\_\_\_  
( if more than one day please indicate how many days ) \_\_\_\_\_
- c) Clerical / support staff have attended courses on marketing / reception skills \_\_\_\_\_
- d) Staff have engaged in one or more evaluation exercises on marketing / external relations (eg a SWOT exercise) \_\_\_\_\_
- e) An external consultant / trainer has run one or more sessions in school \_\_\_\_\_
- f) Departments / pastoral groups have spent staff development time looking at marketing / external relations in their own area \_\_\_\_\_
- g) Other staff development activities in the field of marketing have been undertaken (Please specify) \_\_\_\_\_



## QUESTION 8

**Which of the following does your school use in its marketing activities ?**

- Against each item please tick the box in column 1 if the activity is undertaken.
- In column 2 please indicate the five most important activities in terms of the recruitment of pupils each year ( 1 = most important, 2 = second most important etc)
- In column 3 the five most important activities in terms of the long term image of the school and hence future recruitment of pupils.

	<u>1</u>	<u>2</u>	<u>3</u>
a. Prospectus for parents	_____	_____	_____
b. "Flyer"	_____	_____	_____
c. Prospectus for children	_____	_____	_____
d. School newsletter	_____	_____	_____
e. Special prospectus(eg for sixth form)	_____	_____	_____
f. Gifts eg calendars, pens	_____	_____	_____
g. School concerts / plays	_____	_____	_____
h. Open day / evening	_____	_____	_____
i. Visits to feeder schools:-			
- by staff	_____	_____	_____
- by pupils	_____	_____	_____
j. Advertising the school	_____	_____	_____
k. Advertising school events	_____	_____	_____
l. Strong media links	_____	_____	_____
m. Actively encouraging visitors			
- parents	_____	_____	_____
- industrialists	_____	_____	_____
- politicians	_____	_____	_____
n. School "identity"			
- crest /logo	_____	_____	_____
- school uniform	_____	_____	_____
- in all literature	_____	_____	_____
- in all correspondence	_____	_____	_____
o. Staff development programme			
- on marketing methods (eg writing for the media)	_____	_____	_____
- on marketing awareness (eg dealing with parents)	_____	_____	_____
- on "quality" issues	_____	_____	_____
p. School video			
- professionally made	_____	_____	_____
- made "in-house"	_____	_____	_____
q. Links with former pupils	_____	_____	_____

## QUESTION 9

**How do you evaluate your marketing practice and plan for future activity ?**

Please indicate by ticking the appropriate answer how frequently you use each of the following approaches

	<u>FREQUENTLY</u>	<u>SOMETIMES</u>	<u>RARELY</u>	<u>NEVER</u>
a. Annual review by the SMT or Marketing Group	_____	_____	_____	_____
b. Subjective judgement of the effectiveness of each activity	_____	_____	_____	_____
c. Informal questioning of pupils / parents	_____	_____	_____	_____
d. From unsolicited feedback from eg parents	_____	_____	_____	_____
e. From formal questioning of parents eg by questionnaire	_____	_____	_____	_____
f. Formal review by SMT / Marketing group of each activity	_____	_____	_____	_____
g. Review against "performance indicators" or "quality indicators" pre-set for each activity	_____	_____	_____	_____
h. Using planned marketing research undertaken by the school	_____	_____	_____	_____
i. Using marketing research undertaken by an outside agency ( eg consultant)	_____	_____	_____	_____
j. Using other methods (please specify)	_____	_____	_____	_____

**QUESTION 10**

**How does your school budget for its expenditure on marketing / external relations activities ?**

Please tick the statement which best matches your budgetary approach. If you use several methods under different circumstances, please explain briefly below why this is the case.

- a. The budget is given according to identified tasks / activities for each year \_\_\_\_\_
- b. Finance is allocated on an ad hoc basis as tasks / activities arise \_\_\_\_\_
- c. The budget is calculated as a figure per pupil in the school \_\_\_\_\_
- d. We spend what is necessary to match the marketing activities of competitor schools \_\_\_\_\_
- e. The budget is allocated according to the school's marketing plan and its priorities \_\_\_\_\_
- f. A sum is allocated from the annual budget according to what can be afforded \_\_\_\_\_

**THANK YOU FOR YOUR TIME IN COMPLETING THIS QUESTIONNAIRE**

**PLEASE RETURN IT IN THE ENVELOPE PROVIDED TO:-  
N.Foskett, Lecturer in Education, School of Education, University of Southampton, Highfield, Southampton SO9 5NH**



**APPENDIX**  
**9**

**Covering Letter for 'Expert' Survey Questionnaire**

Name  
Headteacher,  
School,  
Road,  
Town,  
Postcode

date

Dear <Name>,

**Marketing in Secondary Schools Project**

I wonder if I might seek your assistance with some research I am undertaking in the field of "Marketing in Schools" ? As part of the research I am undertaking an "Expert Survey" of some 25 headteachers across England and Wales whose schools have been notable for their work in the fields of marketing or public relations. I am writing to you because of the references to your school in Devlin and Knight's book on public relations and marketing in schools. The questionnaire enclosed is a brief one and should take no more than ten minutes to complete - I would be happy if you wish to ask a deputy or colleague with responsibilities in the field of marketing to fill it in on your behalf. Please return it to me in the envelope provided.

The questionnaire is part of a research project that is examining the responses of secondary schools to the growth of a marketing culture in education in the period since the 1988 Education Reform Act. More specifically it is trying to identify:-

- \* the views that heads, senior staff and other colleagues have of the nature of the educational "marketplace" and the challenges it poses for them
- \* the range of organisational structures that are being developed to cope with the need for marketing and the management of external relations in schools
- \* the approaches to planning, implementation and evaluation which are being adopted with regard to marketing
- \* the specific tactics and strategies which schools are employing as part of their marketing activity.

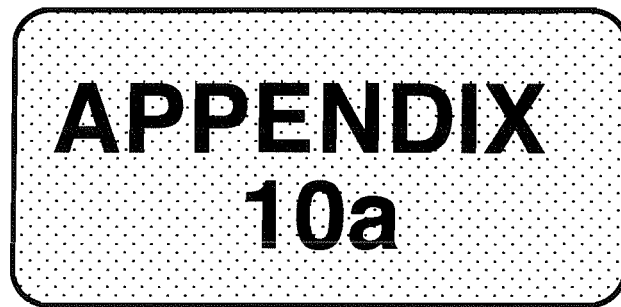
To provide a clear view of current practice one of the elements of the research is an "Expert Survey" of a small number of schools which are known for their work in the field of marketing and the management of external relations. It is in this capacity that I am inviting you to fill in a questionnaire.

I can assure you that your responses will be treated in complete confidentiality and will only be seen in the form of aggregated data from all the schools taking part in the survey. It would also be of enormous value if you could include copies of any documentation relating to your schools planning and strategy in this field, and any marketing material that can easily be mailed.

If you have any queries please do not hesitate to contact me. I look forward to receiving your completed questionnaire.

Yours sincerely,

(N.H.Foskett)  
(Lecturer in Education)



**APPENDIX  
10a**

**Example of Headteacher Interview Notes**

## Headteacher Interview Schedule

### Notes

School Castle School, Alcheston

Headteacher Mr Jones

Date 02 / 11 / 92 2.15-4.00pm

Location Headteachers office

### Transcribed Notes

#### A. Perceptions of Marketing

1. What do you understand by the terms "marketing", "public relations", "external relations", "promotion" ?

- All 'alien to schools' initially, seen not to be a role of schools
- Since 1988 everything has changed, therefore necessary, therefore "we must make the public more aware and attract them here".
- Need to present the school more vigourously, give it a high profile, so we've set about some new policies, but its not coordinated
- Marketing is about selling, about managing relationships, about recruitment - "its about marketing !"
- Not really clear there is any difference between them - they're all about 'selling the school, about recruiting enough or more children'

2. What is your **personal** view of the place of marketing in education ?

- "It should not be role of schools, I feel quite strongly about that"
- It "seems dishonest to me"
- Not what education is fundamentally about, its something extra which doesn't seem to be to do with children.
- "personally uncomfortable with the idea"



### 3. How far is that view modified or constrained by practical realities ?

- "The post-1988 framework has made it necessary-Its now a competitive market"
- Eastville distributed their calendar to many companies and most people in Alcheston, which surprised me
- "The financial survival of schools is at stake now we've got self-governing schools and a market economy"
- "I have been forced to change to meet the new ideas"
- "I am still resistant to active 'external' marketing - the emphasis must be on internal activities and community activities"

### 4. How important is marketing relative to the other management functions of the school ?

- "Its directly linked with school survival, so it should have a central management function, but its not yet there". We spend most of our time on curriculum.
- "It costs jobs if not done effectively", so everything should be in there, but "we currently have to make a conscious effort to consider it".
- Its only a few percent of the time

## **B. Organising for Marketing**

### 5. How has the school's policy and philosophy on marketing changed in the last five years ?

- "Quite a lot"
- In 1987 we gave a Grade A allowance for community and charity issues. In 1992 we replaced this as a marketing post for someone to work with the deputy head in charge of it.
- We have a working party on marketing, chaired by a deputy head and assisted by the marketing person, together with a cross-section of staff who volunteered. It has a 'brief' from SMT with a target to develop a marketing policy and to change the prospectus so that its a marketing document.
- This academic year we are going to do a marketing plan and to develop a strategy

and look for opportunities.

- This is in response to to competition on marketing with Eastville, who have developed a high profile in Alcheston. They have a 'marketing lady' (*said disparagingly and sneeringly (NF)*) who is doing a lot of work.

6. Does the school have a Marketing Plan ?

-No, although we will produce one this year which will focus on strategies and opportunities (*Has not appeared by 1995 (NF)*). Never seen the need for one

7. How far does marketing appear in the School Development Plan ?

- "The SDP is "purely educational" looking at curriculum and resources, but it needs to have marketing and accountancy fused into it" . Marketing will appear in it.

-Its taken two years to develop the SDP, and it needs revising anyway

8. How is the marketing activity of the school organised in terms of.....

a) Who plans the marketing ?

b) How is that planning undertaken ?

c) Who implements the marketing plans ?

e) How is the marketing activity evaluated ?

- "Its done in a haphazard way" - two examples to show this

- Open Evening - our main competitors are Downsview and Eastville, so we need to get this right. Head's initiative to set up an ad hoc working group and they took on the marketing of the open evening. They wrote to primary schools and invited the press, but most of their work was with the planning of the event itself, about organisation.

- Year 11 Presentation Evening. We decided to have no press, because of the gentlemens agreement between the Alcheston schools about not actively publicising or commenting in public on results

- There's no evaluation, only informal evaluation. For example, six or seven parents responded after the open evening voluntarily to indicate they would send their ten year olds to Castle.

## 9. What is the role of each of the following in the school's marketing ?

### a) Head

- "ideas man", to have "lateral thinking" and for "pointing people in specific directions"
- For example, we did a SWOT analysis with the whole staff, and I set up the marketing group.
- "I identify opportunities for marketing, but its very much an ad hoc role"

### b) Deputies

- They consider marketing issues, but for two of them its peripheral to their work. One deputy has responsibility for marketing, and chairs the marketing group and feeds into the SMT.

### c) Pastoral Heads

- We rotate the heads of year, so we always have a new head of year 7. "The next head of yera 7 shows round the new parents and sells the school reactively". Visits junior schools by invitation, including those beyond our catchment
- Head of Year 11 does the Presentation Evening and leads it, chairs it.
- As a group "they are aware that all their links with the external world have marketing opportunities and they need to present the school well"

### d) Academic Heads

- "They are aware they need to show their department in its best colours" and have 'reactive' links with contributing schools, but they concentrate on the academic and educational things not marketing. They don't really do much and aren't very interested.

### e) Main Teaching Staff

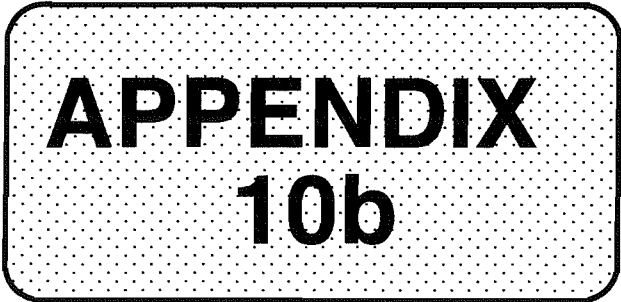
- They are part of teams and work in groups, but they do little pro-active marketing work. "They understand that there should be no washing of dirty linen in public"

f) Support Staff ?

- They are often from the community themselves, therefore they are involved, but they are very supportive, especially the cleaners who are very positive about the schools to the outside world.
- The marketing group will be looking at 'front-of-house' activities in secretarial areas - we need some training in this area (*Castle receptionist / telephonist are the most welcoming of all the schools in Alcheston (NF)*).
- Very aware of letter presentation and tone, and its an issue in which there is a growing awareness amongst the staff.

**Interview finished at 4.00 pm**

**Continuation arranged for 2.00 pm 30 / 11 / 92.**



**APPENDIX  
10b**

**Summary Notes of Headteacher Interviews in Alcheston**

## HEADTEACHER INTERVIEW KEY IDEAS

### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### LEE SCHOOL

#### Q1 What do you understand by the term "marketing" etc?

Selling	"Letting others know what we do well"	Trying to convince those who go elsewhere to come here
Managing Relationships	"Ensuring the school speaks for itself"	"Persuading parents and kids to come here"
Recruitment	Deputy Head has a responsibility for all aspects of external relations including marketing	
Making public aware and attracting them		

#### Q2 What is your *personal* view of the place of marketing in education ?

"Shouldn't be a role of schools"	Accept it as reality	Not comfortable with the idea
"seems dishonest"	"I feel comfortable with the idea of mktg and enjoy it. This is based on a belief in education and comprehensives and the wish to publicise this"	"Quite happy to tell people of the quality of the school"
"Personally uncomfortable with the idea"	could be spent on education. Competition is	"Hate massive expenditure on marketing bringing inflation in marketing costs"
		"I would be much happier with collaboration between schools"

#### Q3 How far is that view modified or constrained by practical realities ?

"The post-1988 framework has made it necessary - it is now a competitive market"	My views reflect reality (see Q2)	We need to do it because other schools do I would be much happier with collaboration the governors are not
"Financial survival of schools is at stake in the market economy"		
"I have been forced to change"		
"I am still resistant to active external mktg - the emphasis must be on internal activities and community activities"		

(Continued .....)

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

CASTLE SCHOOL

DOWNSVIEW SCHOOL

LEE SCHOOL

### Q4 How important is marketing relative to the other management functions of the school ?

"It is directly linked with school survival so it should have a central mgmt function, but not yet there. It costs jobs if not done effectively.

"Currently we have to make a conscious effort to consider it"

Occupies only a few % of time.

"The curriculum dominates , but the Hd has spent a large amount of time in the last two years on external relations. There is a relationship between external relations and other areas..... Its to do with self-esteem, ethos and character in the school which feeds into the curriculum and the classroom. It creates a buzz that feeds into other things"

Very time consuming but little compared to the curriculum and pastoral work.

On a par with finance

### Q5 How has the school's policy and philosophy on marketing changed over the last five years ?

1987 - Grade A allowance for community / charity issues

1992 - new Grade A "marketing" post  
- Cross-staff working party set up to  
a) Develop a mktg policy  
b) Change prospectus

Prior to present Head "mktg was not on the agenda"

Stepwise change to current activity  
Now Deputy Hd with External Relations brief

Dramatic change - "Five years ago it was me". Governors first considered it in 1988

Steady changes to school badge, amateur video

Now pay an allowance to one colleague to coordinate mktg.

### Q6 Does the school have a marketing plan ?

No. New staff working party will produce a Marketing Plan (during '93/'94) to focus on strategies and opportunities.

No

No. New governing body will establish sub-cttee to write a brief and give a budget. Should be a plan by Easter 1993 (There wasn't !)

(Continued .....)

(.....Continued)

### HEADTEACHER INTERVIEW KEY IDEAS

<u>CASTLE SCHOOL</u>	<u>DOWNSVIEW SCHOOL</u>	<u>LEE SCHOOL</u>
<b><u>Q7 How far does marketing appear in the School Development Plan ?</u></b>		
<p>"The School Development Plan is purely educational. It needs to have marketing and accountancy fused into it"</p> <p>The SDP took two years to produce and now needs revising to include these matters.</p>	<p>External relations is covered in the SDP "but is hidden therein"</p> <p>SDP is updated on an annual cycle but no plans for a separate marketing section.</p>	<p>Not as yet but "will be part of the SDP"</p> <p>Currently on the third draft version** dating from Summer '92. Contains:-</p> <ul style="list-style-type: none"><li>a) Need to improve Public Relations</li><li>b) Specific marketing targets</li></ul>
<b><u>Q8 How is the marketing activity of the school organised etc ?</u></b>		
<p>"In a haphazard way"</p> <p>Ideas usually generated by Head and put into practice. No formal planning except of individual events.</p> <p>New Working Party chaired by Deputy Hd with Marketing post-holder plus cross-section of staff. Brief to:-</p> <ul style="list-style-type: none"><li>a) Develop a proposed Mktg policy</li><li>b) Re-design prospectus</li></ul> <p>No formal evaluation. Informal through Head's conversations with parents or from unsolicited responses.</p>	<p>SMT has oversight and responsibility for whole school. Very much top down approach to External Relations at present.</p> <p>Deputy has External Relations brief</p> <p>Each staff team has responsibility for curriculum, material resources, human resources and external relations in its area</p> <p>No formal evaluation</p>	<p>Used to be SMT responsibility (Hd, 3x DH 3x Fac Hd, Bursar).</p> <p>Still SMT, but advised by colleague with mktg interest (Grade D). After SMT 92 diferent colleague to be given role of Publicity Officer with one point allowance.</p> <p>"No attempt at structured evaluation, prob. because of the cost in time. We might poss use a questionnaire"</p> <p>Hd monitors intake numbers and considers unsolicited feedback from parents</p>

(Continued .....)



(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

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### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### LEE SCHOOL

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#### Q9 What is the role of each of the following in the school's marketing ?

**HEAD** Ideas Man - lateral thinking  
Pointing people in specific directions  
Developing the idea eg with SWOT analysis  
and Mktg Group  
Identify opportunities for mktg

Leads thinking and is pro-active  
Shows new parents around school

"the Head must show that he/she is the boss". Must have a high profile, be present at events, have photo in the press

Lead on all visits to feeder schools

**DEPUTY HEADS** One DH chairs Mktg group  
All discuss matters at SMT meetings  
Otherwise peripheral

One DH has External Relations brief

2nd Deputy (Pastoral) leads in publications  
- edits (not writes) prospectus  
- prepared video  
She also leads pastoral teams in external links

3rd Deputy (Community). "community is special to this school, and promotes other activities. It is fundamental to increasing income and is therefore a pivotal role"  
- goes on feeder school visits  
- attends public meetings  
- on PR sub-committee

**PASTORAL HEADS** Rotate ie Y7->Y8->Y9 etc  
Y7 Hd - Shows new parents round  
- Visits feeder schools in & out of catchment  
- "sells school reactively"

Each has a specified responsibility to promote the school in their outside links

Years rotate, but Y7 Hd permanent. She liaises with primary schools on all matters

Y11 Hd liaises with all careers matters

**Y11 Hd** - Chairs "Presentation Evening"

**Others** - "Aware that all links with external world have mktg opportunities and they need to present the school well"

(Continued .....)

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

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### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### LEE SCHOOL

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#### Q9 Cont'd

**ACADEMIC HEADS** Focus is academic, but "they are aware they need to show their dept in its best colours"  
Each has a specified responsibility to promote the school eg through press releases on their activities

Reactive links with contributory schools

Give talks at open evenings

One Hd of Faculty attends each primary school visit (rotates)

Informal links through eg industry visits, TVEI groups

"some recognise this as external relations, and some do not"

**MAIN TEACHING STAFF** All are part of larger teams, but engage in little proactive marketing.  
Little pro-active work, but engage in the work of larger teams

"They understand that there should be no washing of dirty linen in public"

Same as for academic Heads

**SUPPORT STAFF** Often from the community themselves so are involved.  
Important, but not specifically aware of their role

Very supportive, esp. cleaners

Receptionist - very aware of her own role

Building superintendent not quite so aware, "just doing a job"

Mktg group will look at "front-of-house" activities for secretarial staff eg letter presentation, telephone manner.

Good at tapping into local gossip.

Growing awareness of their role

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(Continued .....)

(.....Continued)

### HEADTEACHER INTERVIEW KEY IDEAS

#### CASTLE SCHOOL

#### DOWNSVIEW SCHOOL

#### LEE SCHOOL

#### Q10 What experience is there of "training" for marketing on the school staff ?

<u>Head</u> Very little. Read a few books eg Marland	One Team Head has done Mktg MA unit at Southampton Univ.. No whole staff training.	Very little. Some in-house training for SMT on talking to primary schools.
<u>DH i/c Mktg Group</u> One day Industrial Society Conference	Experience is useful. Two members of SMT have Mktg experience	Head has attended occasional sessions on marketing at general education conferences
<u>Other Colleague (Middle Manager)</u> One day Industrial Society Conference	in previous schools - Hd and DH. No need for training as techniques are easy.	Training for office staff includes "dealing with the public"
MA unit on Mktg at Southampton Univ.	Consultancies offer nothing that schools cannot provide themselves.	
<u>Rest of Staff</u> One day INSET on SWOT Analysis		
Working Party asked to identify INSET needs, but only £2600 in total INSET budget and Mktg a low priority.		

#### Q 11 What are the current problems in developing a marketing strategy ?

Financial resources	Some staff resistance, often political resistance:-	Financial and time resources
Time resources	" selling their souls" " dishonesty"	Some resistance from staff, but no clear pattern related to age or experience.
Not a priority for the LEA, because mktg is all about competition and hence independence from the LEA	" rubbing shoulders with the devil" But general movement towards acceptance with a feeling that "it needs to be done". "Some newer staff very enthusiastic, but	

(Continued .....)

(.....Continued)

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**HEADTEACHER INTERVIEW KEY IDEAS**

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**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**LEE SCHOOL**

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**Q 11 Cont'd**

older staff show more resistance ....  
although the greater resistance seems  
more linked to narrowness of experience  
than age"

---

**Q 12 How is the budget for marketing activities calculated and allocated ?**

Not identified as a separate item.  
Budgets for prospectus and INSET.  
INSET budget delegated to Deputies,  
but Hd holds the ultimate responsibility

Separate budget code for PR, calculated by  
retrospective and historical methods, to  
include prospectus (£3000) and video  
(£2000, but one off)  
Otherwise spending is ad hoc.

No separate PR budget, but do have  
budget headings for prospectus and  
letters to parents.

Some INSET may be spent on staff training

The prospectus is an area where no savings  
will be made, despite financial difficulties.  
"Most governors appreciate that the benefits  
of the prospectus exceed its costs"

Some "one-off" expenditure (eg on display  
boards - £500)

Total expenditure probably directly about  
£1000 p.a. but this will increase. And much  
other spending may be seen as secondary  
marketing (eg on school visits)

---

**Q 13 Who holds the budgets for marketing activities ?**

Head, but INSET budget delegated to DH

Head, but INSET budget delegated to DH

Head, but INSET budget delegated to DH

---

(Continued .....

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### LEE SCHOOL

#### Q 14 What marketing research has been undertaken in / by the school ?

"None under the title of marketing research" None in any formal way	None	
Open evening includes talking to parents and parents are questioned informally at public meetings	Information collected in an ad hoc way, and through the School Association.	Some ad hoc data collection eg gossip from teachers, responses to adverts
Recognise that mktg research is necessary and may use it in the future	"Might use a qnnaire to parents later in the year, but not sure about this. It might ask about impressions and presentation, but there is a danger it may generate expectancy of change and raise issues "	"There is no real need for it - common sense tells us what we need to know"

#### Q 15 What marketing methods are used by the school ?

Not listed in order of priority and all serve several functions:-	a) <u>Prospectus</u> . Designed by Science teacher then reworked by Hd and Governors Wkg Gp Will become new DHs job. Rejected external design consultants. LEA printed it Happy with it Placed in local estate agents	a) <u>Children themselves and word-of-mouth</u> are the most important. "We must review, encourage and increas pupil involvement in all we do " ie displays of pupil work on walls,scrap book in Reception.
a) <u>Conducted tour of prospective parents</u> Costly on time, but very valuable	b) <u>Video</u> . 1991made by a parent, script by Hd, Hd of English + pupils. New video will be "more controlled", but "in-house" for cost	b) <u>Press coverage</u> very important
b) <u>Christmas Concerts</u> . very important. This year will do two not one.	c) <u>Media Links / Press Releases</u>	c) <u>Primary School visits</u> by senior staff to On one occasion invited them to Lee School to see them all in one go - this was a failure.
c) <u>Prospectus</u> . Re-designed this year	d) <u>"Word-of mouth"</u>	d) <u>Prospectus</u> Changed to loose-leaf
	e) <u>Head meets parents of pupils moving into the area</u> . Occupies many hours, "but well worthwhile"	

(Continued .....)

(.....Continued

## HEADTEACHER INTERVIEW KEY IDEAS

<u>CASTLE SCHOOL</u>	<u>DOWNVIEW SCHOOL</u>	<u>LEE SCHOOL</u>
<p>d) <u>Word -of-Mouth</u>. Very important for current parents</p> <p>e) <u>Open Evening</u>. For parents of 10 year olds. Initiative from Hd, but set up ad hoc staff group to organise it. Write to all primary schools. Invite press. Set up in response to competition from Eastville, Downview and Southend.</p> <p>f) <u>Presentation Evening</u>. For awards etc. No press invited. "Gentlemen's agreement with other local schools on no publicity and no comments on results".</p>	<p>f) <u>Open Days</u>. New idea as well as Open Evenings. Very succesful - 50% of prospective pupils had a parent attend (130). parents visit school at work, sit in class etc</p>	<p>style - new design. Evaluated by comments - "Went well - one parent asked "Is this an LEA school ?""</p> <p>e) <u>Standardised published material</u>. This is area for development. Dept letters could be improved. Will use DTP.</p>

### Q 16 How do you see marketing in the school developing over the next decade ?

"I wonder what is the point of it all ? Every pupil you gain is somebody else's loss."

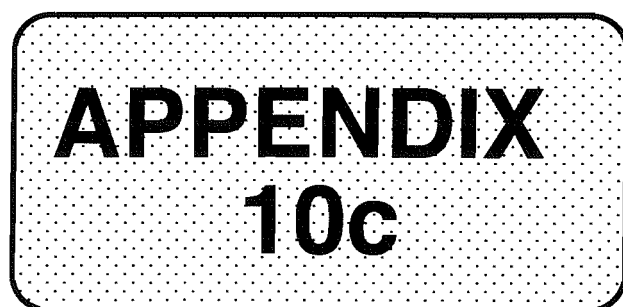
No comment

No comment

"We must support parental choice"

"When we reach capacity and make "selections" on any criteria, then this is negative publicity"

The LEA has no understanding of competition and marketing



**APPENDIX  
10c**

**Summary Notes of Second Phase Headteacher Interviews  
in Alcheston**

## HEADTEACHER FINAL INTERVIEW KEY IDEAS

### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### LEE SCHOOL

#### Q1 What do you understand by the term "marketing" etc ?

-They are all a means to an end, to "develop a positive corporate image to enhance our popularity"

-Communicating about what we do at the school and what we do well"  
- Mktg is about a third of ER

- "Not clear - I don't know - I'm not sure what the end-product should be."  
- Its a balance between numbers and quality

#### Q2 What is your *personal* view of the place of marketing in education ?

-Alien to begin with, but now quite different and important

-"If its about communicating its useful. I have reservations in terms of competition with other schools - then it can be a waste of time"

-"Its not too bad in Winchester"

- "If you've got it, flaunt it"  
- "Its about educating people about education"  
- Quite comfortable with the idea.  
- has experienced mktg in a very intense area before, so is "cleverer on tactics and more wary than many Heads"  
- "Gentlemen's agreements are outdated"

#### Q3 How far is that view modified or constrained by practical realities ?

-No answer

- legal responsibility and communication need

- Competition with schools in Alcheston and further afield is stiff

#### Q4 How important is marketing relative to the other management functions of the school ?

-Very important because of the competition - ER is about a quarter of managerial responsibilities specifically, but its in all we do, eg curr. links with other schools  
- We now spend more time thinking about presentation

- "Everything I do is mktg"

(Continued .....)



(.....Continued)

## HEADTEACHER FINAL INTERVIEW KEY IDEAS

### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### LEE SCHOOL

#### Q5 How has the school's policy and philosophy on marketing changed over the last five years ?

-Mktg Group has produced a policy, and it now "underpins everything that we do". There have been substantial changes, and it is implicit that all we do is marketing.

Policies include:-

- out-of catchment parents get better treatment
- telephone should only ring twice
- 3 days response time to all enquiries
- active use of the press to present image
- "Some staff still baulk a little at the ideas, esp if Hd too strident about it, but they will do the key things"
- "We don't talk about 'marketing' in meetings, we do it through other directions"

- Staff now accept the inevitability of it and link it to their own job, but its a mixture of grudging and positive response

- we're much tighter on organisation of events eg Open Day. Recognise that "one of the best maktg strategies is getting it right on the day"

- considered strategy more carefully. Now emphasise "success with starred A's at GCSE, and the development of the well-rounded citizen" to counter former image of "mixed ability mediocrity".

- Has become more important, but not more aggressive

- Can't stop the marketing-advertising spiral

#### Q6 Does the school have a marketing plan ?

- No - its in the SDP

- No

- No

#### Q7 How far does marketing appear in the School Development Plan ?

- Each element of the SDP has a marketing component linked to it

- As before

- No

(Continued .....)

(.....Continued)

## HEADTEACHER FINAL INTERVIEW KEY IDEAS

### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### LEE SCHOOL

#### Q8 How is the marketing activity of the school organised etc ?

- |  |   |  |
|--|---|--|
| - No real change in last twelve months, but now based in the policy from the Mktg Gp | - As before in structure                                    | - As before - using first year in post to evaluate activity, so only minor modifications this year |
| - Some evaln now undertaken of activities  | - Each staff team now produces its own leaflet about itself | - Governor working party reinstated  |
| - Some mktg research on origins of all enquiries                                     | - Some staff devpt on "presenting to parents"               | - Instituted formal evaln of practice through staff qnnares  |
|  | - Some mktg research on recruitment data and trends.        |  |

#### Q9 What is the role of each of the following in the school's marketing ?

- |                  |             |             |
|------------------|-------------|-------------|
| - Same as before | - As before | - As before |
|------------------|-------------|-------------|

#### Q10 What experience is there of "training" for marketing on the school staff ?

- |  |  |   |
|--|--|---|
| - half day INSET for whole staff on purpose and nature of the Open Evening | - Some staff devpt on presenting to parents for middle managers within the regular cycle of meetings | - As before, but evaln by staff of events is part of training |
|--|--|---|

#### Q 11 What are the current problems in developing a marketing strategy ?

- |  |  |             |
|--|--|-------------|
| - No real change since last interview  | - "Not sure it has changed since last time, but its perhaps a little more tense" | - No answer |
| - Better relationships with other schools so there is less threat. Eastville is trying to emulate aspects of Castle eg uniform | - Eastville is seeking to emulate Castle   |             |

(Continued .....)

(.....Continued)

**HEADTEACHER FINAL INTERVIEW KEY IDEAS**

**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**LEE SCHOOL**

**Q 12 How is the budget for marketing activities calculated and allocated ?**

- |   |   |   |
|---|---|---|
| - As before, but a 50% increase in prospectus funding this year to enable it to be sent to all present pupils | - Same as before, but budget has gone down in real terms by c5%. Not needed because a lot was spent in my first two years | - "There is not a pot labelled marketing, only one for the prospectus |
|---|---|---|

**Q 13 Who holds the budgets for marketing activities ?**

- |            |             |             |
|------------|-------------|-------------|
| -As before | - As before | - As before |
|------------|-------------|-------------|

**Q 14 What marketing research has been undertaken in / by the school ?**

- |   |   |  |
|---|---|--|
| - Questionnaire to parents about the Open Evening       | -Recruitment data and trends  | - Some informal feedback, otherwise none |
| - Enhanced data collection on applicants                | - Governors did some research informally to look at image. Lead to emphasis on "starred As" |  |
| - "It used to be the authorities problem, now its mine" |   |  |

**Q 15 What marketing methods are used by the school ?**

- |   |             |   |
|---|-------------|---|
| - Open Evening very important                             | - As before | - As before, but...   |
| - prospectus now sent to all current pupils               |             | - Open day moved to summer term                                       |
| - ensuring first contact with prospective parents is good |             | - prospectus will be revamped - "its boring"                          |
|   |             | - will next year provide minibus to one village to attract its pupils |
|   |             | - need more press coverage  |

(Continued .....)

(.....Continued)

**HEADTEACHER FINAL INTERVIEW KEY IDEAS**

**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**LEE SCHOOL**

**Q 16 How do you see marketing in the school developing over the next decade ?**

- More competition, but a greater  
integration of mktg into everyday life  
in schools

- Will become more tense on issues like pupil  
exclusions  
- Parents have good insights into published data  
- Some concern about declining collegiality

- Will become more important



**APPENDIX  
11**

**Summary Notes of 'Marketing Manager' Interviews in  
Alcheston**

## “MARKETING MANAGER” INTERVIEW KEY IDEAS

### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### THE LEE SCHOOL

#### Q1 What do you understand by the term “marketing” etc?

- "Its about image, presentation, being conscious of appearance"
- Done implicitly in the past, but not organised or planned.
- "Necessary as a need to recruit pupil numbers, and it means jobs"

- External relations is about "making sure all external dialogue is managed as effectively as possible, including EWOs correspondence, community, building users, press relations"
- Marketing is about "getting the product right, then telling people"
- The product is "the whole school experience", not the pupil.
- Its not just about "tailoring the product to outside demand", and it involves explaining decisions eg on mixed ability
- "the ethos of the school is a fundamental part of it, and the management of internal relations is part of this"

- Good communication within the school and with outside agencies to promote what is good in the school life to:-
  - a) Raise the esteem of people working within the school
  - b) maintain numbers in the school
  - c) maintain good relations with community
- PR - similar to marketing
- ER not a familiar term.

#### Q2 What is your *personal* view of the place of marketing in education ?

- In favour - it is fundamentally important
- Comfortable and positive about it - it has always been there
- It is essential, and integral to curriculum management (eg results) and to personal relationships(eg morale).
- It has to be considered in all aspects of the work we do

- "My views have developed as a parent and this has modified a former purist educational view"
- Education needs to market to help parents choose a school

- "It fits comfortably with me"
- I have always wanted to promote educn. Teachers have been far too reticent to promote the good things they do. It is necessary for morale.
- I see no conflict with educn aims unless there is a strong element of competition.

(Continued.....)

(.....Continued)

**“MARKETING MANAGER” INTERVIEW KEY IDEAS**

**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**THE LEE SCHOOL**

**Q3 How far is that view modified or constrained by practical realities ?**

- " Do people appreciate the connection between marketing and the future of the school ?
- There is a need for better internal communications.

- The idea "doesn't fit comfortably on the shoulders of most staff"
- "Staff haven't appreciated the ramifications and the need for marketing - there is some complacency.

- The first task is to convince the internal culture.

**Q4 How important is marketing relative to the other management functions of the school ?**

No comment

- Tends to come in peaks and troughs eg Open Day, parents meetings, so its difficult to decide its overall relative importance.
- Always important to establish links and welcome people to the school.

- "Far too little - the SMT needs to recognise its importance. It is still seen as a "bolt-on", not as an integral part of the role of management"

(Continued.....)

(.....Continued)

**“MARKETING MANAGER” INTERVIEW KEY IDEAS**

**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**THE LEE SCHOOL**

**Q9 What is your role in the school’s marketing ?**

- Chair of Mktg Working Party. This has a rep. from each Dept, who consults and disseminates. The group.....
- a) Sets up marketing tasks
- b) Develops policy statements, aims and objectives
- c) Focuses on practical issues
- d) Manages the Open Evening
- e) Considers literature presentation
- f) Manages Prospectus
  
- Link with the media - meet with colleague with media links responsibility once per week.
  
- My own role is fundamental

- Overall External Relations responsibility, but delegate some tasks.
  
- Look at ways of improving things, and have input to SMT on policy. Then responsible for follow-up.
  
- “Policy does not exist - it needs to be written- but this is because no-one had responsibility.
  
- Some complacency about the place - most action very much about responding.

- Media connections - need to maintain and expand this
  
- “I want to produce a marketing plan and talk to governors but this will take time - at the earliest by the end of this academic year”
  
- Need to explore what the students’ idea of what the school is to.....
- a) Base mktg in the pupils
- b) To gain a sense of school identity - the school doesn’t have one at the moment.
  
- Manage the internal and external appearance of the buildings (with caretaker) - this reflects pride in the environment.
  
- Most important task is to influence the head and SMT about the need to manage the image of the school.

**Q 10 What experience do you have of training for marketing ?**

- Artist by background, so always had an interest in “image”
  
- No formal training in marketing
  
- Attended an “Industrial Society” course in London but only 60% useful - there is always a problem of training from agencies outside schools  
Intended to go on a local college one day course but it did not run

- Some input during MSc (Ed) course, and own dissertation was on school marketing in town I was working in at the time
  
- None

(Continued.....)



(.....Continued)

**“MARKETING MANAGER” INTERVIEW KEY IDEAS**

**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**THE LEE SCHOOL**

**Q 11 What are the current problems in developing a marketing strategy ?**

- |  |   |   |
|--|---|---|
| <ul style="list-style-type: none"><li>- Time</li><li>- Budget</li><li>- There is danger of “inflation” in the mktg process with each school needing to do more and more to compete with others.</li><li>- Need rather more “action plans” in the school</li><li>- Need some <u>low-level</u> consultancy from outside the school.</li><li>- Need some input into the whole staff to develop a marketing culture.</li></ul> | <ul style="list-style-type: none"><li>- Staff resistance. This is partly resistance to change and partly perceptions of what its all about eg resistance to “vamped up” Open Evening and Open Day in the daytime.</li><li>- My role is diverse, so pulling it together may be very difficult.</li><li>- “We need to recognise that marketing is everybody’s responsibility”</li></ul> | <ul style="list-style-type: none"><li>- Money. Although a responsibility for Mktg, finance is controlled by SMT Finance cttee. Money is usually available for small sums &gt;£500.</li><li>- Staff apathy - “in pockets”.....<ul style="list-style-type: none"><li>a) teachers do not feel a responsibility for pupil behaviour or attitudes.</li><li>b) “there is a general feeling that the Head does not give support or leadership and people lose heart”</li></ul></li></ul> |
|--|---|---|

**Q 12 How is the budget for marketing activities calculated and allocated ?**

- |  |  |   |
|--|--|---|
| <ul style="list-style-type: none"><li>- Totally ad hoc at present</li><li>- Difficult to specify true exoenditure eg extra-curricular activities cost the school some £4-5000 per annum, but how much of this is marketing ?</li></ul> | <ul style="list-style-type: none"><li>- No comment</li></ul> | <ul style="list-style-type: none"><li>- Ad hoc by the Finance Committee. Sums &lt;£500 usually available.</li></ul> |
|--|--|---|

(Continued.....)

(.....Continued)

**“MARKETING MANAGER” INTERVIEW KEY IDEAS**

**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**THE LEE SCHOOL**

**Q 13 Who holds the budgets for marketing activities ?**

No comment

- No comment

- see above

**Q 16 How do you see marketing in the school developing over the next decade ?**

No comment

- Increased competitiveness, which will become more hard-edged. Schools will move away from working collaboratively. Already in Alcheston things are very guarded compared to the town I worked in before.

- But...parents will have more information on school choice and will make use of it

- We need to market state education

- Here the Head is a constraint because of his lack of awareness of PR, but he will retire in three years.

- Preparation for inspection will generate an audit - "things may come from that"



**APPENDIX  
12**

**Summary Notes of Governor Interviews in Alcheston**

## CHAIRS OF GOVERNORS INTERVIEW KEY IDEAS

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### CASTLE SCHOOL

### DOWNSVIEW SCHOOL

### THE LEE SCHOOL

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#### Q1 What do you understand by the term "marketing" etc ?

"Attempting to sell a commodity or a community"

-All terms mean the same

- "Showing and selling our wares"

- Not just attracting in pupils, but keeping the community informed. "This is the aim of all of PR and mktg"

- "Selling yourself and the school to attract the greatest number of pupils, and to create the right reputation in the community - creating the school's persona. Its all part of mktg"

---

#### Q2 What is your *personal* view of the place of marketing in education ?

"It is absolutely inevitable, and quite right. We need to look for excellence, and marketing can highlight this or identify areas of needs"

-Comfortable with the idea

- Mixed feelings. Good for the community to be aware of what the school is about. Reject element which is touting for business - contrary to the concept of education

- Very healthy, but disastrous for disadvantaged areas who cannot win.

- "Out of the ashes some good will come, but there will be ashes"

- "Uncomfortable with poaching other schools' pupils, but would defend parents right to choose"

---

#### Q3 How far is that view modified or constrained by practical realities ?

- Marketing is very important, and is as important as the LEA will allow.

- It is important to continue community links

- We have falling rolls, and financial needs  
- We have a reasonably secure market for geographical reasons, but we cannot afford to lose pupils

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(Continued.....)

(.....Continued)

**CHAIRS OF GOVERNORS INTERVIEW KEY IDEAS**

**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**THE LEE SCHOOL**

**Q4 How important is marketing relative to the other functions of the Governors ?**

- Little in the past, but will be more important in the future.

- Last Chair of Governors pretended it did not exist

- Low priority issue

- Working ideas of it, but not very effective.

- The Governors have been instrumental in

getting recognition of PR and Marketing. Grew out of LMS - set up a sub-committee on PR.

- Still comparatively peripheral in Govnr's meetings.

**Q9 What is your role in the school's marketing ?**

- "I am the public face of Castle School"

- Committed, supporting and here. Show parents around.

- Few directly, but many indirectly through policy formulation.

- "Everything I do linked to Lee School is an ambassadorial role"

**Q10 What experience do you have of "training" for marketing ?**

- Run small business, so some PR experience. - None

- "I have, and know, teenage children"

- Librarian, so some experience in providing information, otherwise none.

(Continued.....)

(.....Continued)

**CHAIRS OF GOVERNORS INTERVIEW KEY IDEAS**

**CASTLE SCHOOL**

**DOWNSVIEW SCHOOL**

**THE LEE SCHOOL**

**Q 15 What marketing methods are used by the school ?**

- Open evenings - gets parents into the place - Links with feeder schools very good

- Good with prospective parents

- School uniform.

- visits by parents - 95% very good

- prospectus very good

- letters good

**Q 16 How do you see marketing in the school developing over the next decade ?**

- Will be more and more important

- Cannot see it declining. Some schools in very competitive places will struggle to compete. Schools do not really have the time or the resources to do much marketing.

- Will be much more high profile, with resource implications



**APPENDIX  
13a**

**Example of Staff Sample Interview Notes**

## STAFF SAMPLE INTERVIEW SCHEDULE

INTERVIEWEE Jeff Pring  
SCHOOL Castle

POST Head of Year / Temp Hd Humanities  
DATE / TIME 26 / 11 / 92 11.45

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### INTRODUCTION

The purpose of this research project is to examine how schools in the Alceston area are operating in terms of Marketing. I have spoken with members of the SMT, but wish to discover how other colleagues see the school's work in this field and its approach to marketing. I want to ask you a series of questions in a number of areas.

### A. ABOUT YOUR OWN VIEWS ON MARKETING AND EXTERNAL RELATIONS

#### 1. What do you understand by each of the following terms?

##### a) **MARKETING**

The school is projecting its chosen image to the outside world. Its about strategy.

##### b) **PUBLIC RELATIONS**

A range of activities established to create a good external image. Its about creating the right attitude towards the school

##### c) **EXTERNAL RELATIONS**

Clarifying perceptions of all those involved with the school, together with dealing with gossip and innuendo

##### d) **PROMOTION**

Promotion takes a specific aspect of a school and tries to highlight it as a strength.

#### 2. Marketing is a term we hear more frequently in schools nowadays. How do you feel personally about this growth of marketing activity in schools ?

"Uncomfortable with projecting an image which may not be reality, and with the competitiveness which is encouraged". It seems too emphasise too much the quantifiable outcomes of a school

#### 3. How important do you feel marketing is to the well-being of the school ?

Very important. "Its make or break". We need to actively manage perceptions and the whole of our external relations

### B. ABOUT YOUR OWN SPECIFIC RESPONSIBILITIES IN THIS AREA

#### 1. What duties and responsibilities do you have in the fields of marketing ?

- My personal presentation, the way I dress and the image I create
- As a teacher, the way I teach, deal with parents, relate to pupils, and my links with EWOs
- As Hd of Yr - dealing with parents both individually and in groups, and with feeder schools
  - events and functions, for example my appearance at presentation events to Y10/11s
  - organising events eg Treasure Hunt for PTA
  - letters to parents, the way they are written
- As member of the Mktg group I have an interest and some knowledge in mktg.



**2. How important do you feel your work is within the whole school's marketing activities ?**

- "Its critical - as a year head I have a pivotal post in the school's marketing programme"

**3. What could be done to increase your effectiveness in those duties ?**

- The school as a whole needs to become much more focused on the community - all schools should be community schools. We need to seek opportunities for whole school staff development which generates this

**4. What training, if any, have you had for those duties and responsibilities ?**

- My MA(Ed) course had a unit on marketing  
- LEA INSET course on 'active learning' emphasised the pupil centred approach in areas beyond the curriculum, and was useful in developing counselling skills  
- Both these provided chance for personal reflection on marketing and communications issues

**C. ABOUT YOUR SCHOOL'S CURRENT MARKETING ACTIVITIES**

**1. How much discussion of marketing issues takes place in the following spheres ?**

**a) On school INSET days**

- Whole school INSET day on SWOT Analysis

**b) In departmental / Faculty meetings ?**

- Nothing specific, but we discuss particular events like presentation evening

**c) In whole staff meetings ?**

- None

**d) Informally amongst the staff ?**

- "Yes, staff consider the way the school is perceived - its important to most of them for professional reasons and pride"

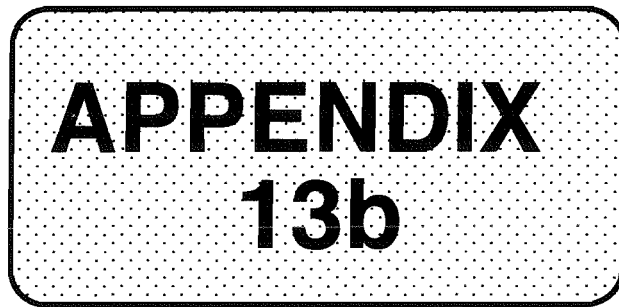
**(e) (for governors) In governors meetings ?**

n.a.

**2. How much influence does the staff as a whole have on the formulation of school policy in marketing and ER ?**

- "We go through a process of consultation, but its not necessarily taken on board by senior management. The new marketing group may change all that"

**Interview Completed at 12 .55**



**APPENDIX  
13b**

**Results from the Staff Sample Interviews**

## Staff Sample Survey Results

The data from the staff sample survey is displayed on the following pages as an Excel spreadsheet. The following notes are to assist interpretation:-

\* Most column headings refer to the question numbers from the staff sample interview schedule, included as Appendix 4

\* The following key describes the other headings:-

Sch = School

Int N = Number of staff member interviewed

Role = Staff member's position and role in the school

\* The keys to the individual questions are provided in the relevant sections of the thesis text, but the following key describes the other headings

**School**      CS = Castle School              DV = Downsview School  
                  LS = The Lee School            BY = Bycars School  
                  HV = Hillview School

**Role**            HD = Head of Department    HF = Head of Faculty  
                  HY = Head of Year            T = National Scale Teacher  
                  ST = Senior Teacher        CT = Caretaker  
                  B = Bursar                    RP = Receptionist  
                  G = Governor

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
2	Sch	Int.N	Role	A1 Over	A1 Mktg	A1 PR	A1 ER	A1 Pro	A2	A3	B1	B2	B3	B4	C1 INSE	C1 Dept	C1 Staff	C1 Infor	C1 Gov	C2
3																				
4	CS	1	ST	C	B	C	C	E	A	A	D	D	C	E	-	-	-	-	-	C
5	CS	2	HY	C	A	E	B	C	D	A	C	B	C	A	B	-	-	-	-	D
6	CS	3	CT	B	A	A	C	E	A	A	C	C	C	A	A	A	A	-	-	-
7	CS	4	B	C	B	B	C	E	D	A	C	C	C	A	A	A	A	-	-	-
8	CS	5	T	C	B	B	D	C	B	A	D	C	C	B	B	A	C	-	-	C
9	CS	6	G	C	A	C	C	C	A	A	C	C	C	A	B	A	C	-	-	B
10	CS	7	HY	C	D	C	C	E	C	A	C	D	B	G	B	B	A	C	-	B
11	CS	8	HD	C	B	E	A	B	D	B	B	A	B	A	B	A	A	-	-	B
12	DV	9	G	C	B	A	D	E	D	A	B	-	A	A	B	A	A	-	-	B
13	DV	10	T	C	A	E	D	E	D	C	B	B	A	A	A	C	A	C	-	A
14	DV	11	T	C	B	E	B	D	C	A	B	A	A	A	A	C	A	C	-	-
15	DV	12	T	C	B	E	D	C	A	A	C	C	A	A	A	B	C	C	-	B
16	DV	13	T	C	C	B	B	A	A	A	C	B	B	B	A	C	C	C	-	D
17	DV	14	T	C	B	E	B	A	D	A	B	B	B	A	A	C	B	A	-	A
18	DV	15	HF	C	C	C	B	E	C	A	C	C	C	A	A	B	A	B	-	B
19	DV	16	HD	C	B	E	B	E	C	A	C	C	C	A	A	B	A	A	-	B
20	LS	17	B	C	A	C	D	D	A	A	C	B	A	B	A	-	-	-	-	B
21	LS	18	HY	C	A	A	A	E	D	A	C	D	B	A	A	B	A	C	-	B
22	LS	19	RP	B	A	D	D	E	A	A	C	C	B	A	A	A	A	-	-	B
23	LS	20	T	C	B	C	B	C	A	A	B	B	A	B	A	B	A	B	-	A
24	LS	21	T	C	A	E	A	C	C	A	A	A	A	A	A	B	B	A	-	A
25	LS	22	HD	C	B	C	B	A	D	A	B	B	B	A	A	B	B	B	C	A
26	LS	23	T	C	B	A	E	A	A	A	A	C	C	B	A	-	-	-	-	-
27	BY	24	HD	B	A	A	A	B	C	C	B	D	-	B	A	A	A	-	-	-
28	BY	25	HD	C	D	B	D	E	C	-	-	-	-	B	-	-	-	-	-	-
29	BY	26	T	C	C	B	A	A	D	A	D	-	C	E	-	-	-	-	-	A
30	BY	27	ST	B	D	-	-	-	D	C	B	-	E	A	-	-	-	-	-	-
31	BY	28	HY	B	A	B	B	B	C	A	D	C	B	A	B	A	A	A	-	D
32	BY	29	T	C	B	B	B	B	C	A	B	B	A	A	A	B	A	A	-	D
33	HV	30	HD	C	D	C	C	E	D	A	B	D	B	A	A	C	A	B	-	C
34	HV	31	T	C	A	B	A	A	A	A	B	B	A	A	A	A	A	B	-	A
35	HV	32	HD	C	A	B	C	C	C	A	A	B	-	A	A	B	B	B	-	A
36	HV	33	ST	C	B	A	A	A	A	A	A	E	D	B	C	A	A	A	-	B



**APPENDIX  
14**

**Results from the Pupil Survey**

## Pupil Questionnaire Results

### Question 3.

Who made the choice of which school you should go to ? (Please put a tick next to your chosen answer)

	<u>Number</u>	<u>Percent</u>
a. My parents	<u>34</u>	<u>21</u>
b. My parents, although they listened to my views	<u>18</u>	<u>11</u>
c. Mainly my own choice	<u>29</u>	<u>18</u>
d. My parents and me both liked the same school	<u>82</u>	<u>50</u>

(Continued.....)

(.....Continued)

**Question 4.**

From where did you find out your information about the school when you were making your choice ? Against each source of information put a tick to show whether you got a lot of information, some information or no information from there.

	<u>A LOT</u>		<u>SOME</u>		<u>NONE</u>	
	<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>
a. From my Primary School Class Teacher	15	9	102	64	41	26
b. From my Primary School Headteacher	10	6	71	45	77	49
c. From this school's booklet or brochure	69	43	63	40	27	17
d. From older brothers or sisters	50	31	25	16	84	53
e. From older friends	42	27	71	45	44	28
f. From articles in the local paper	3	2	28	18	123	80
g. From a visit to the school	106	68	41	26	9	6
h. From the school's Open Day	54	34	65	41	38	25
i. From my parents	45	28	94	59	21	13
j. From a talk at my primary school by someone from the secondary school	67	43	52	33	38	24
k. From somewhere else (Please write here where else you got information from _____)	10	12	14	16	62	72



**APPENDIX**  
**15**

**Results from the Parent Survey**



## Parent Questionnaire Results

### Question 3.

(Please tick to indicate your answer)

Who made the choice of secondary school for your son / daughter ?

	<u>Responses</u>	<u>%</u>
a. I / we did	30	24
b. I / we did, although our son's / daughter's views were listened to	50	41
c. Mainly our son's / daughter's choice	9	7
d. I / we liked the same school as our son / daughter	34	28

(Continued.....)

(.....Continued)

**Question 4.**

Where did you find out information about the school when you were making your choice ? Please indicate by ticking the appropriate answer how much information you got from the following sources

		<u>A LOT</u>		<u>SOME</u>		<u>NONE</u>	
		<u>No.</u>	<u>%</u>	<u>No</u>	<u>%</u>	<u>No</u>	<u>%</u>
a.	From your son's / daughter's Primary School Class Teacher	11	12	42	46	38	41
b.	From the Primary School Headteacher	6	7	40	48	38	45
c.	From the secondary school's booklet or brochure	70	62	39	35	3	3
d.	From brothers or sisters experiences at the secondary school	43	49	8	9	37	42
e.	From friends / colleagues	22	23	55	58	18	19
f.	From articles in the local paper	4	5	17	21	60	74
g.	From a personal visit to the school	52	50	37	36	15	14
h.	From the school's Open Day / Open Evening	52	50	33	32	18	17
i.	From parents of other children at the primary school	7	9	43	53	31	38
j.	From parents of other children at the secondary school	18	20	49	55	22	25
k.	From a talk at the primary school by someone from the secondary school	30	34	24	28	33	38
l.	From another source (Please specify.....)	10	29	1	3	23	67

(Continued.....)

(.....Continued)

**Question 9.**

Please read the following statements about the relationship between schools and the community. Please indicate with a tick your feelings about each statement.

STATEMENT	AGREE STRONGLY		AGREE A LITTLE		DISAGREE A LITTLE		DISAGREE STRONGLY	
	No	%	No	%	No	%	No	%
1. Marketing is not something schools should engage in. It should be up to parents to find out what they wish to know for themselves	14	12	40	33	30	25	37	31
2. The idea of marketing by schools is in opposition to the whole idea of education	13	11	34	29	39	33	33	28
3. Parents have a right to choose their child's school, and marketing by schools gives them useful information to make their choices	77	63	34	28	9	7	3	2
4. Competitive marketing between schools sharpens up their concern for how they operate and for meeting parental wishes	59	49	41	34	15	12	5	4
5. Only those schools that market themselves strongly will survive	22	18	44	36	39	32	18	15
6. Schools should spend their money on the pupils, not on marketing activities.	45	37	52	43	19	16	5	4
7. "Word-of-mouth" is the best form of advertising - schools should concentrate on good teaching and good results and these will speak for themselves without the need for marketing	53	43	40	33	22	18	7	6
8. A little "publicity" is a good thing for a school, but strong marketing is inappropriate.	36	30	51	42	25	21	9	7
9. Marketing is a part of all businesses and services, and is just as appropriate in schools	21	18	61	51	26	22	11	9
10. Marketing by schools is not a good thing, but is essential in the current climate	20	17	49	41	33	28	17	14



**APPENDIX  
16**

**Summary Notes of Headteacher Interviews in Manport**

## HEADTEACHER INTERVIEW KEY IDEAS

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### BYCARS SCHOOL

### HILLVIEW SCHOOL

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#### Q1 What do you understand by the term "marketing" etc?

- "Hard to distinguish marketing from fostering parental participation, and saying what is good - winning hearts and minds"
- Mktg is different from PR, which is mainly about conveying a message
- "Publicising and public relations"
- All mean the same

---

#### Q2 What is your *personal* view of the place of marketing in education ?

- "If marketing is informing parents, then I am happy with it, but I would not want to have undesirable objectives eg would not allow a tobacco company to sponsor leaflets (use Barclays Bank)"
- "We do not market - we just put our best side forward"

---

#### Q3 How far is that view modified or constrained by practical realities ?

- No comment
- No comment

---

#### Q4 How important is marketing relative to the other management functions of the school ?

- Not a high priority because intake is static and budget in surplus - but competition from other schools would change this.
  - Head "works in entrepreneurial mode"
  - Two new Senior Teacher appointments, one for Fund-raising and one for Publicity
  - All staff are expected to take part, even though it is not a contractual obligation.
- 

(Continued.....)

(.....Continued)

**HEADTEACHER INTERVIEW KEY IDEAS**

**BYCARS SCHOOL**

**HILLVIEW SCHOOL**

**Q5 How has the school's policy and philosophy on marketing changed over the last five years ?**

- Always aware of external world - had prospectus prior to legal requirement.
- See Q4
- Governors have become irritated by strong marketing by Hillview School , so Head set up Marketing Group.
- Also, many primary schools take open enrolment very seriously and may "send" children out of the district.

**Q6 Does the school have a marketing plan ?**

- No
- No. "I have an ad hoc approach to dealing with marketing"

**Q7 How far does marketing appear in the School Development Plan ?**

- SDP is slowly being developed. Exists, but being changed. No specific mention of marketing, but may be included.
- Recently completed SDP. Marketing underpins everything in there.

(Continued.....)

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

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### BYCARS SCHOOL

### HILLVIEW SCHOOL

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#### Q8 How is the marketing activity of the school organised etc ?

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>- Marketing Group formerly existed to advise the Head ( Head, Head of Lower School, Community Liaison Tutor (Chair), Head of Y7).<br/>Deals "with the showy peripherals such as the logo and leaflets"</li><li>- Appraisal this year has meant the Group has ceased to operate</li><li>- Head leads strongly and does most of the work</li><li>- (NF Comment) Head is retiring - losing interest ?</li></ul> | <ul style="list-style-type: none"><li>- Head evaluates by "talking to everybody and measuring by my own yardstick". "I judge by customer satisfaction"</li><li>- "I work on intuition, not on structures"</li><li>- "This is a headteacher-lead school, and I am about a lot"</li><li>- React well and strongly to parental complaints</li><li>- May seek BS 5750</li><li>- Marketing is integrated into the ethos of planning in the school. Head has produced regular documents called "The Way Forward"</li><li>- Head develops ideas for marketing with the two appointed Senior Teachers and the Chair of Govs</li></ul> |
|--|---|

---

#### Q9 What is the role of each of the following in the school's marketing ?

HEAD- Leads and takes most of the decisions

DEPUTY- No specific responsibilities

HEAD

PASTORAL - Hd of Y7 visits feeder schools "if invited (she is very poor at representing the school, so other member of SMT goes with her )Other Heads of Year speak at Parents' Evenings

- Headteacher-led school. All staff have a role, but only the two appointed Senior Teachers have a specific responsibility.

(Continued.....)

(.....Continued)

**HEADTEACHER INTERVIEW KEY IDEAS**

**BYCARS SCHOOL**

**HILLVIEW SCHOOL**

**Q9 CONT'D**

**ACADEMIC HEADS** - No specific responsibility

**TEACHING STAFF** - No specific responsibilities

- One appointment ("C" allowance) for School-Community Liaison, who also chairs Marketing Group. She is part-time, so some problems.

**SUPPORT STAFF** - No comment

**Q10 What experience is there of "training" for marketing on the school staff ?**

- Hd has run Marketing courses regionally on behalf of local College Education Management Centre

- Hd has attended "a number" of courses by the local University on eg "Handling the Press". Mostly useful.

- DHs and Community Liaison Tutor have attended similar courses.

- INSET Day on SWOT analysis for all staff

- Hd attended Industrial Society conference on marketing and "was very impressed"

- No training for staff "because I do the marketing"

(Continued.....)



(.....Continued)

**HEADTEACHER INTERVIEW KEY IDEAS**

**BYCARS SCHOOL**

**HILLVIEW SCHOOL**

**Q 11 What are the current problems in developing a marketing strategy ?**

- |  |              |
|--|--------------|
| - Y7 Tutor needs replacing   | - No comment |
| - Inability to form meaningful relationships with partner primary school Heads. Not sure why - perhaps they wish to retain their independence. |              |
| - Not enough money and time. Always balancing professional and marketing needs   |              |

**Q 12 How is the budget for marketing activities calculated and allocated ?**

- |  |  |
|--|--|
| - Budget allocated to identified marketing needs at start of financial year. | - Little for marketing per se.   |
| - Calculated as "past + growth factor".                                      | - Best marketing expenditure is the £20,000 spent mainly on staffing (32 promotions) |

**Q 13 Who holds the budgets for marketing activities ?**

- |        |        |
|--------|--------|
| - Head | - Head |
|--------|--------|

**Q 14 What marketing research has been undertaken in / by the school ?**

- |  |   |
|--|---|
| - "Never done any. I believe the results would be ambiguous and hence very questionable" | - No formal market research - "but it doesn't tell you anything, so it is not much use" |
|--|---|

(Continued.....)

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

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### BYCARS SCHOOL

### HILLVIEW SCHOOL

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#### Q 15 What marketing methods are used by the school ?

- |  |   |
|--|---|
| - Publications. Prospectus. Monthly newsletter to parents.   | - High profile of the Head  |
| - Communications with parents very imp. Hold termly meetings for parents in each year group to discuss an issue of current significance. 8-30 attend. "Our aim is partnership with parents"  | - Good primary school liaison. Feeder school pupils can use facilities on site. |
| - Annual meeting of Parents with Governors very important. 40-70 attend  | - Good publicity materials eg prospectus  |
| - Visit feeder schools (6) "only if invited. Y7 tutor + member of SMT. Do not go to non-feeder schools, but send a single copy of the prospectus   | - New logo / crest, designed by one of the governors.                           |
| - Advertisements eg in regional "Good Schools Guide", local leisure services handout etc.  | - Pupil newspaper, professionally produced.                                     |
| - Media links. Very good. Head aware of this since damaging political comments on the school by Rhodes Boyson in 1978 made national press and TV. Head positively cultivates publicity, and seeks to be true about education as a whole. Has done radio 'phone-ins' and the school was the subject of a "fly-on-the-wall" documentary in 1989. | - New PTA   |
|  | - Press invited on to the site.   |

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(Continued.....)

(.....Continued)

**HEADTEACHER INTERVIEW KEY IDEAS**

**BYCARS SCHOOL**

**HILLVIEW SCHOOL**

**Q 16 How do you see marketing in the school developing over the next decade ?**

- |  |   |
|--|---|
| - Need new signage   | - Will vary according to the local environment                                      |
| - Want to re-vamp the school entrance to create better first impressions. Will cost £25,000 and there is some staff resistance to spending money, but "It will be their view we need to do this by the time I've finished" | - Marketing will intensify, especially in cities                                    |
|  | - Niche marketing will increase, despite the National Curriculum.                   |
| - Will use new sports hall and science block as positive marketing features.   | - We need to spend time "marketing education"                                       |
|  | - Marketing will become more competitive with an emphasis on efficiency and quality |
| - Pupils will all be on one site.  | - Development of a Sixth form.  |



**APPENDIX  
17**

**Summary Notes of Headteacher Interviews in  
Norbridgeshire**

## HEADTEACHER INTERVIEW KEY IDEAS

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### FENSIDE SCHOOL

### CHALKLANDS SCHOOL

### THE ABBEY SCHOOL

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#### **Q1 What do you understand by the term “marketing” etc?**

- “Putting up in front of people the good things about the school and making available to parents as much information as possible to:-

- a) Encourage pupils to come
- b) make them aware of our standards and values”. So a PR view.

- Normally “selling to customers”, but we are not in that business and we are not under pressure to sell”

- There is a distinction between PR and mktg. PR is about being answerable to the community and about developing and nurturing relationships with the outside world and the management of it.

- “Improving the School’s Image in the community”

- “Marketing is about explaining yourself, not about gloss - it is about accountability”

- PR is about presentation

---

#### **Q2 What is your *personal* view of the place of marketing in education ?**

- “I feel comfortable with marketing - it is a natural element of management”

- “I don’t want it to be too strong”

- “Not comfortable with the idea, because it is premised on the notion of pupils as customers buying a good, but education is about “rights and entitlements” “

-Can be a conflict between mktg and educational culture.

-Positive perspective by staff. Few staff are “anti”. The Business manager is seen as taking this responsibility away from staff and has raised the school’s profile in the city. This is good for jobs and good for promotion, “the staffroom thinks it is worth it”

---

#### **Q3 How far is that view modified or constrained by practical realities ?**

- No comment

- Response to some incidents (eg pupils smoking pot) is coloured by the need to manage PR.

- “It is a long term survival issue - we need to recruit pupils”

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(Continued.....)

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

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### FENSIDE SCHOOL

### CHALKLANDS SCHOOL

### THE ABBEY SCHOOL

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#### Q4 How important is marketing relative to the other management functions of the school ?

- Doesn't occupy much time, but this is increasing.

- Fairly small scale - a small percentage of time is spent on it

- No comment

---

#### Q5 How has the school's policy and philosophy on marketing changed over the last five years ?

- The programme is much tighter now, and we recognise it must be good.

- New developments eg  
a) head now goes with other staff to visit primary schools in Autumn Term  
b) New termly newsletter

- pupils moving into the area are now processed much more carefully - ie attention is paid to the admissions procedure, with both a member of SMT and Head of Year involved.

- Changed in terms of the quality of material and literature, but this is as much due to access to Desk Top Publishing as to a change in climate (eg new prospectus)

- there is a changing awareness of external relations needs - "it is a really powerful influence"

- School began mktg as a pilot school under LMS, so "was ahead of the game"

- Image of school has changed. Head took over after two temporary Heads. Has changed the culture from a school that was a "thug's paradise" to a "more civilised school with a strong ethos, clear vision and firm purpose". But this was not seen as marketing.

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#### Q6 Does the school have a marketing plan ?

- No

- No

- No

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(Continued.....)

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

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### FENSIDE SCHOOL

### CHALKLANDS SCHOOL

### THE ABBEY SCHOOL

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#### Q7 How far does marketing appear in the School Development Plan ?

- |  |   |  |
|--|---|--|
| - Little reference in the SDP  | - No overt reference to marketing, but there are refs to communications with parents (eg parents evenings, newsletters, social occasions etc) | - Marketing is a separate section in the SDP |
| - Last year's target areas included "marketing the new buildings", especially for community use. |   | - Fifth SDP - "now getting it right"         |

---

#### Q8 How is the marketing activity of the school organised etc ?

- |   |  |   |
|---|--|---|
| - SMT plans the marketing, although some consultation with governors. Reactive process.   | - no planning - "we simply discuss events"   | - Business Manager takes lead in planning and implementing marketing  |
| - implementation responsibility varies and depends on what it is eg<br>a) New building opening - DHs<br>b) "Writer in residence" - English dept.<br>All comes through Hd who then delegates to appropriate place. | - one DH organises the Open Evening. Head did new prospectus, but this will be delegated to other SMT member | - Marketing Committee supports this. Bus. Manager former Bank Manager - many good ideas but "Mktg Cttee needs reining in a bit - it has too many exciting ideas, and needs to come back under the Head's control" |
| - Mktg "is not a specific responsibility of anybody. It is a fairly loose structure, because this works"  | - Some evaluation eg Debrief after Open Evgs and new response sheet in reports                               |   |
| - No real evaluation  |  |   |
- 

(Continued.....)

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

FENSIDE SCHOOL

CHALKLANDS SCHOOL

THE ABBEY SCHOOL

### Q9 What is the role of each of the following in the school's marketing ?

**Head** -Everything comes through the Head who then delegates

- major input on all matters - needs to "set the tone". All media approaches go via the Head. "This may be due to my newness as a Head"

- delegates responsibility to Marketing Cttee, but retains overall control

**Deputy Heads**

-No specific responsibility. Lead individual tasks.

- One DH has some named responsibilities eg Open Evening

**Pastoral Heads**-Responsible for press links with respect to their year group

- Hds of Year manage Parents Evenings

- Y7 Tutor is a key person  
- All links with parents

**Academic Heads**

- Art/drama have specific responsibilities, with awareness of PR dimension

- Varies. Expect press ideas from all for newsletter  
- Head of PE manages community sport, with advertising and profit-making activity

-None really, but submit prospectus entries  
- two colleagues on the Marketing Cttee.

**Main Teaching Staff** -Only if involved in a specific activity eg Science Dept has links with local Water Company

-None really

**Support Staff**

- Support staff are key people

(Continued.....)



(.....Continued)

**HEADTEACHER INTERVIEW KEY IDEAS**

**FENSIDE SCHOOL**

**CHALKLANDS SCHOOL**

**THE ABBEY SCHOOL**

**Q10 What experience is there of “training” for marketing on the school staff ?**

- Hd and one DH attended one day course on media links given by local radio station.

- None known

- No purposeful strategy to persuade staff

- No INSET has been undertaken in the school. Some Heads of Department have discussed things informally.

- Head has “done a few bits”

- No INSET, but the field is not an issue in school.

**Q 11 What are the current problems in developing a marketing strategy ?**

- small staff (38.5fte) and cannot find someone appropriate to coordinate activity, so it falls on to the Head. Have considered giving role to a single admin. person.

- None really

- Terrific objections from the staff at first, but this has been overcome by cash benefits and a change in ethos

- There is a danger of missing good publicity opportunities because of time pressures. Need a calendar of events. nb Wife of local paper editor on staff !

- There is a “gentleman’s agreement locally on marketing, “but there are some gremlins in this, although this is not a major problem”.

(Continued.....)

(.....Continued)

**HEADTEACHER INTERVIEW KEY IDEAS**

**FENSIDE SCHOOL**

**CHALKLANDS SCHOOL**

**THE ABBEY SCHOOL**

**Q 12 How is the budget for marketing activities calculated and allocated ?**

- |  |  |  |
|--|--|--|
| - "Budgeting is random"  | - Ad hoc budgeting, but extra money is put in as necessary eg to upgrade Y9 choice booklet | - Business manager has responsibility for drawing up plans. Mainly reactive. |
| - Prospectus is an identified cost and is costed properly.             | - There is a budget or staff recruitment   |  |
| - others are on an ad hoc basis, with a "reactive system of budgeting" |  |  |

**Q 13 Who holds the budgets for marketing activities ?**

- Head

- Head

-Head

**Q 14 What marketing research has been undertaken in / by the school ?**

- None

- Questionnaire on the newsletter was included with it

- Informal questioning of parents on why so many choose the school as second choice.

- feedback on the new style reports

(Continued.....)

(.....Continued)

## HEADTEACHER INTERVIEW KEY IDEAS

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### FENSIDE SCHOOL

### CHALKLANDS SCHOOL

### THE ABBEY SCHOOL

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#### Q 15 What marketing methods are used by the school ?

- |   |  |  |
|---|--|--|
| <ul style="list-style-type: none"><li>- Prospectus. Produced and written by Hd</li><li>- Visits to 7 primary schools in Autumn term. Head but the Head of Dept in charge of primary liaison. New idea. Informal, interactive presentation to parents and pupils. "We may not need to do it but we do not know"</li><li>- SMT visit each primary school informally</li><li>- Newsletter to parents / pupils</li><li>- good media links / image</li></ul> | <ul style="list-style-type: none"><li>- Prospectus</li><li>- Open Evening in the Autumn Term</li><li>- Monthly newsletter</li><li>- Primary school liaison. Very good.<ul style="list-style-type: none"><li>a) Heads of primary schools meet at school every month</li><li>b) Head of Y7 (permanent post) visits schools</li><li>c) Open Evening</li><li>d) Induction day for new pupils</li></ul></li><li>- Parents evenings</li><li>- Social event for parents at the start of year</li><li>- Concerts etc.</li><li>- Media links. Mixture of pro-active and re-active<br/>Needs to be improved.</li></ul> | <ul style="list-style-type: none"><li>-Uniform. Uniform sub-cttee developed new uniform.</li><li>- New logo. Developed through a competition, designed by Y8 pupil. Fits new image.</li><li>- Board Game - "Cambridge by Degrees", a marketing idea from a Newcastle company</li><li>- Literature. New Governors' report got a commendation in Times Educational Supp. competition. Will design new matching prospectus for next year. 'Lettings' leaflet.</li></ul> |
|---|--|--|
- 

(Continued.....)

(.....Continued)

**HEADTEACHER INTERVIEW KEY IDEAS**

**FENSIDE SCHOOL**

**CHALKLANDS SCHOOL**

**THE ABBEY SCHOOL**

**Q 16 How do you see marketing in the school developing over the next decade ?**

- No comment

- "A negative view would be that I fear that schools might succumb to pressure to be atomised rather than working as a network. GM may precipitate this"

- "a good future would be that collegiality will remain and marketing will enhance communications with the school's community"

- "We mustn't get too far away from providing education for 11-16s. We only go into other spheres to raise the money we need to do this. We have the balance right on this"



**APPENDIX  
18**

**Summary Notes of Governor Interviews in Manport and  
Norbridgeshire**

## CHAIRS OF GOVERNORS INTERVIEW KEY IDEAS

HILLVIEW SCHOOL

THE ABBEY SCHOOL

### Q1 What do you understand by the term “marketing” etc ?

- "Selling, to enable people to see the good points about the school, and to eradicate the bad points - to get pupils"
- All terms mean the same
- Raise public profile to....
  - a) increase pupil numbers
  - b) maximise school revenue
  - c) improve public awareness and use of school facilities
- PR, Mktg etc all have the same aim

### Q2 What is your *personal* view of the place of marketing in education ?

- Keen on community schools and parental choice. Competition is good, but we're not competing for the right reasons - its only about keeping the costs of education down.
- Very important

### Q3 How far is that view modified or constrained by practical realities ?

- It is of the utmost importance to do it professionally. Must not do down other schools.
- Terrific objections from the staff at first, but interesting to see how the staff have been persuaded by the marketing culture

(Continued.....)

(.....Continued)

**CHAIRS OF GOVERNORS INTERVIEW KEY IDEAS**

**HILLVIEW SCHOOL**

**THE ABBEY SCHOOL**

**Q4 How important is marketing relative to the other functions of the Governors ?**

- No Governors group on marketing, but one is planned
- Marketing is the role of a Governors' sub-committee. The Governors and senior staff have lead the changes.
- Governors have had ideas, and built confidence

**Q9 What is your role in the school's marketing ?**

- As a politician, to provide vision, but also to constrain marketing within "good standards"
- Central - see Q4

**Q10 What experience do you have of "training" for marketing ?**

- Skills from being a politician, and running own business.
- Director of a Building Co. so very commercially focused

(Continued.....)

(.....Continued)

**CHAIRS OF GOVERNORS INTERVIEW KEY IDEAS**

**HILLVIEW SCHOOL**

**THE ABBEY SCHOOL**

**Q 15 What marketing methods are used by the school ?**

- No answer

- Lettings for community use

- Culture of the school

- Good promotional literature

- Good media relations

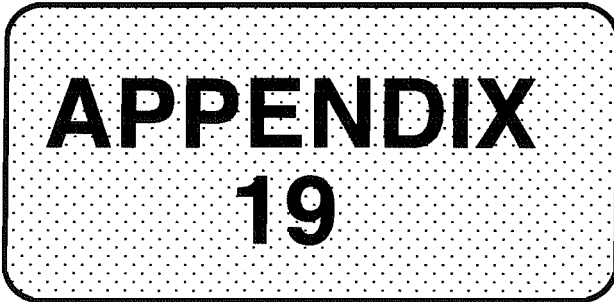
**Q 16 How do you see marketing in the school developing over the next decade ?**

- People will sharpen their perceptions of marketing, and be aware of its subtleties. Schools will need to tackle the moral issues in marketing.

- Need to be aware of high standards of marketing materials

- Must not get too far away from providing education for 11-16s.





**APPENDIX  
19**

**Results from the 'Expert' Survey**

## “Delphi” Questionnaire Results

### QUESTION 1

Please provide the following descriptive information about your school

<u>Sub Question</u>	<u>Responses</u>	
b) Age range of school (eg 11-16)	11-16	= 15
	12-16	= 3
c) Type of school	Mixed Comprehensive	= 15
	Girls Comprehensive	= 1
	Boys Comprehensive	= 2
d) Designation of school	LEA	= 15
	GM	= 3
e) Current roll	500-750	= 7
	751- 1000	= 7
	1001-1250	= 4
	> 1250	= 1
h) Please tick one of the following to indicate the trend of intake of pupils over the next five without marketing the school	Increasing rapidly	= 4
	Increasing slowly	= 7
	Stable	= 4
	Declining slowly	= 2
	Declining rapidly	= 1
i) Name and status of person completing this questionnaire	Headteacher	= 9
	Deputy Headteacher	= 4
	'Marketing Manager'	= 4
	Other	= 1

(Continued.....)

(.....Continued)

## QUESTION 2

Marketing, public relations, external relations and promotion are all terms used increasingly in education management.

Please indicate briefly below what you understand by each of these terms

For Key see pages 144-146

<u>Aspect of Marketing</u>	<u>Category</u>					
	<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>	<u>E</u>	<u>F</u>
Overall	0	7	8	-	-	-
Marketing	3	2	8	2	3	-
Public Relations	0	8	3	1	6	-
External Relations	2	7	4	5	-	-
Promotion	0	0	10	0	0	8

(Continued.....)

(.....Continued)

### QUESTION 3

**How is the management of marketing in your school organised ?**

Please tick as many of the following as appropriate.

	<u>Number</u>
a) The Head consults but takes the lead in all policy making and external relations activities	8
b) A Deputy Head (or very senior member of staff) takes responsibility for marketing and external relations, but this is not a major part of his/her role	8
c) A Deputy Head (or very senior member of staff) takes responsibility for marketing and external relations, and this is a major responsibility that he/she undertakes	4
d) Marketing / external relations is coordinated by a colleague not on the senior management team	1
e) A committee (working group) of a cross-section of staff plans the operation of marketing within a policy framework set by senior management / the Head	3
f) A committee (working group) of a cross-section of staff plans the operation of marketing and has substantial influence on policy making by the Head / SMT	2
g) The Governing Body has a sub group (working group) which plays an important role in marketing policy	3
g) Policy and practice in marketing is organised in another way (please specify)	
- Individuals given tasks by headteacher	1
- SMT work together and share tasks	1
- All staff are involved	2

(Continued.....)

(.....Continued)

#### **QUESTION 4**

**How far is marketing an integral part of school planning ?**

Please tick as many of the following as appropriate

**Number**

- |  |           |
|--|-----------|
| <b>a) The school has a development plan</b>  | <b>18</b> |
| <b>b) The school development plan (SDP) covers marketing issues in a few places but not as a separate field</b>                                | <b>8</b>  |
| <b>c) Marketing has a high profile within the SDP</b>  | <b>8</b>  |
| <b>d) The school has a separate marketing plan</b>   | <b>2</b>  |
| <b>e) Marketing and external relations issues are an overt part of the planning process undertaken by Heads of Department / pastoral Heads</b> | <b>5</b>  |
| <b>f) Marketing is planned "event by event"</b>  | <b>5</b>  |

(Continued.....)

(.....Continued)

## QUESTION 5

**Why has the school developed the marketing practice and policy that now operate ?**

Please tick as many of the following statements as are appropriate.

If you tick more than one item, please use the right hand column to indicate the order of importance of the items (1=most important, 2= second most important etc)

<u>Reason (Summary)</u>	<u>Responses</u>	<u>Number by Rank</u>						
		<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
a) Legal obligations	12	1	1	2	2	3	2	0
b) Other schools aggressive	8	2	1	2	1	2	0	0
c) Head's personality	7	0	2	2	0	2	0	0
d) School always publicised	16	3	3	6	1	1	0	1
e) Marketing key to management	8	0	0	1	5	0	1	1
f) Needs of parents and pupils	14	1	5	4	3	0	0	0
g) Quality	14	7	5	1	1	0	0	0
h) Enjoyable	5	0	0	1	1	0	2	1
i) Parental choice	3	0	0	0	1	1	0	1
j) Other reasons	5							
- Need to recruit pupils	2	1	1	0	0	0	0	0
- To reverse a negative image	1	1	0	0	0	0	0	0
- To promote community aspect of school	1	0	0	0	0	0	0	0
- To build parental confidence and student pride	1	0	1	0	0	0	0	0

n.b Not all respondents ranked the answers they gave, so rank totals do not necessarily equal response totals

(Continued.....)

(.....Continued)

## QUESTION 6

**What experience of training in the field of external relations and marketing do key staff have ?**

Please tick the appropriate answers under each column. Leave blank if answer not known.

	<u>Head</u>	<u>Colleague with responsibility for marketing</u>	<u>Key * Governor</u>
<b>a)Industrial / commercial experience of marketing</b>	2	3	6
<b>b)Attended a short course on marketing (eg 1 day )</b>	9	9	3
<b>c) Attended a long course on marketing (eg weekend,etc)</b>	3	3	1
<b>d) Read books on school marketing</b>	10	10	0
<b>e) Attended management course including marketing</b>	5	7	4
<b>f) Attended long course on management including marketing (eg MA(Ed), MBA)</b>	2	3	1

\* The "Key Governor" is that governor who is most influential in terms of marketing practice in the school. It may or may not be the Chair of Governors.

(Continued.....)

(.....Continued)

## QUESTION 7

**What staff development activities have been organised to support marketing in the school ?**

Please tick as many of the following as appropriate

	<u>Responses</u>
a) One or more teaching staff have attended courses on marketing	11
b) At least one whole-school training day has considered marketing in the school	6
c) Clerical / support staff have attended courses on marketing / reception skills	6
d) Staff have engaged in one or more evaluation exercises on marketing(eg SWOT)	6
e) An external consultant / trainer has run one or more sessions in school	6
f) Departments / pastoral groups have spent staff development time looking at marketing	7
g) Other staff development activities in the field of marketing have been undertaken (Please specify)	7
- No staff development	2
- Thorough review of staff / parent links	1
- Staff meetings	1
- Investors in People	1
- Two year project on parent-school links	1
- Teacher placements in industry	1

(Continued.....)



(.....Continued)

## QUESTION 8

Which of the following does your school use ?

-Against each item please tick the box in column 1 if the activity is undertaken.

-In column 2 please indicate the five most important for short-term recruitment

-In column 3 the five most important activities for long term recruitment .

<u>Method</u>	<u>1</u>	<u>2</u>					<u>3</u>				
	<u>Responses</u>	<u>Short-term</u>					<u>Long-term</u>				
	<u>(Total)</u>	<u>Number by Rank</u>					<u>Number by Rank</u>				
		<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
a. Prospectus for parents	18	3	2	6	2	2	1	1	3	3	2
b. "Flyer"	10	0	1	2	0	1	0	0	0	1	0
c. Prospectus for children	8	0	1	1	0	0	0	1	0	0	0
d. School newsletter	17	0	0	1	0	1	0	0	0	1	0
e. Special prospectus	10	0	1	0	0	2	0	0	0	1	1
f. Gifts eg calendars, pens	2	0	0	0	0	0	0	0	0	0	0
g. School concerts / plays	18	0	0	1	1	1	0	0	0	2	1
h. Open day / evening	18	4	2	2	3	2	1	2	3	1	2
i. Visits to feeder schools:-											
- by staff	18	3	6	0	1	0	2	3	1	1	0
- by pupils	10	3	1	3	0	0	3	0	3	0	0
j. Advertising the school	11	1	0	1	2	0	0	0	2	1	0
k. Advertising school events	15	0	0	0	0	0	0	0	1	1	0
l. Strong media links	16	0	2	3	1	1	2	2	3	1	1
m. Actively encouraging visitors											
- parents	18	3	2	2	3	2	3	2	1	2	3
- industrialists	17	0	0	0	0	1	1	0	1	0	1
- politicians	10	0	0	0	0	0	0	0	0	1	0
n. School "identity"											
- crest /logo	18	0	0	0	0	0	0	0	0	0	0
- school uniform	16	0	1	1	1	2	1	1	0	0	2
- in all literature	18	0	0	0	0	0	0	1	0	0	0
- in all correspondence	18	0	0	0	0	0	0	0	0	0	0
o. Staff development programme											
- on marketing methods	4	0	0	0	0	0	0	0	0	0	0
- on marketing awareness	9	0	0	0	0	0	0	0	0	0	0
- on "quality" issues	12	1	0	2	0	0	2	1	2	0	0
p. School video											
- professionally made	1	0	1	0	0	0	0	0	0	0	0
- made "in-house"	7	0	0	0	0	0	0	0	0	0	0
q. Links with former pupils	13	0	0	0	1	0	0	0	1	0	0
r. Others											
- Interview parents	1	1	0	0	0	0	1	0	0	0	0
- "grapevine"	1	1	0	0	0	0	1	0	0	0	0

(Continued.....)

(.....Continued)

## QUESTION 9

**How do you evaluate your marketing practice and plan for future activity ?**

Please indicate by ticking the appropriate answer how frequently you use each of the following approaches

	<u>FREQ</u>	<u>SOME</u>	<u>RARE</u>	<u>NEVE</u>	<u>N / A</u>
a. Annual review by the SMT or Marketing Group	9	3	2	2	2
b. Subjective judgement of the effectiveness of each activity	10	5	0	0	3
c. Informal questioning of pupils / parents	6	8	2	0	2
d. From unsolicited feedback from eg parents	7	10	1	0	0
e. From formal questioning of parents eg by questionnaire	3	7	3	4	1
f. Formal review by SMT / Marketing group of each activity	6	6	1	3	2
g. Review against "performance indicators" or "quality indicators" pre-set for each activity	3	4	2	6	3
h. Using planned marketing research undertaken by the school	1	6	2	5	4
i. Using marketing research undertaken by an outside agency (eg consultant)	1	1	0	12	4
j. Using other methods (please specify)	1	5	0	1	10
- Analysis of applications	1	0	0	0	0
- Contact with feeder schools	0	1	0	0	0
- Pupil questionnaires	0	1	0	0	0
- PTA Consultation	0	2	0	0	0
-SWOT with parents and pupils	0	1	0	0	0

(Continued.....)

(.....Continued)

## QUESTION 10

**How does your school budget for its expenditure on marketing / external relations activities ?**

Please tick the statement which best matches your budgetary approach. If you use several methods under different circumstances, please explain briefly below why this is the case.

	<u>Numbers</u>
a. The budget is given according to identified tasks / activities for each year	6
b. Finance is allocated on an ad hoc basis as tasks / activities arise	6
c. The budget is calculated as a figure per pupil in the school	0
d. We spend what is necessary to match the marketing activities of competitor schools	1
e. The budget is allocated according to the school's marketing plan and its priorities	5
f. A sum is allocated from the annual budget according to what can be afforded	2