

# A Topology of Three-Wave Models of Strategic Leadership in Education

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**Abstract:** *The diversity in contemporary conceptualisations of strategy and strategic leadership in education reflects the increasing complexity and uncertainty in the relationship between the changing context and leadership. This paper aims to propose a typology of three-wave models for conceptualising and analysing the diversities in strategic leadership. Based on different models and their related paradigms in education and reforms, strategic leadership can be classified as internal strategic leadership, interface strategic leadership and future strategic leadership. In different models, strategic leadership in education is characterised by different assumptions of education environment, types of education reforms and movements, positioning of education institution, nature of learning, conception of effectiveness, nature of competition and demand for sustainability. Correspondingly, key features of strategy, leadership role, and strategic concerns of leadership are completely different across these three models.*

## Changing Context of Leadership in Education

The context of school leadership has been rapidly changing since the late 1980s, which is reflected particularly in numerous past and ongoing educational reforms and school restructuring movements not only in western countries such as Canada, the USA and the UK, but also in the Asia-Pacific Regions such as Australia, New Zealand, mainland China, Singapore, Malaysia and Hong Kong (Fullan 1998; Lieberman 1998; Chapman, Sackney, & Aspin 1999; Cheng & Townsend 2000). In particular, nine major trends of changes in different areas and levels of education have been observed in the Asia-Pacific Region (Keeves & Watanabe 2003; Cheng 2005a). At the macro level, the main trends of educational reforms include re-establishing a new national vision and new educational aims for schools; restructuring education systems at different levels for new educational aims; and market-driving, privatising and diversifying school education.

At the meso level, increasing parental and community involvement in education and management is a salient trend. At the site level, the major trends consist of ensuring education quality, standards and accountability in educational institutions; implementing decentralisation and school-based management; and enhancing teacher quality and lifelong professional development. At the operational level of educational institutions, the main trends include using information and communication technology (ICT) in learning and teaching and applying new technologies in management, and making a paradigm shift in learning, teaching and assessment. These nine trends of educational changes at different

levels have changed nearly every key aspect of most educational systems in the region and had tremendous impacts on the context of educational leadership and its practice.

In addition to the above changes and challenges, the trend of the declining school-age population in these ten years is also creating a great potential transformation in educational contexts of the East-Asia and Pacific region. As indicated in the UNESCO Institute of Statistics report of 2006, most countries in this region are experiencing a decline in the school-age population which will represent from 3% to 41% for the period from 2005 to 2015. Correspondingly, there have been significant declines in demand for school places, causing serious school closure or competition for students among schools. This trend has also accelerated the movement of marketisation and school competition in education initiated by educational reforms in some countries in the region.

### **Contextual Challenges and Strategic Leadership**

These contextual changes have created serious impacts and challenges to the traditional thinking and practice of leadership in education and have driven the emergence of new strategic thinking and leadership in education (Cheng 2002a, b). Educational leaders are expected to be more strategic in their leadership and lead their schools proactively face up to the contextual challenges with strategies. Even though the concept of strategic leadership is still vague and the domain of studying it is relatively diffused and uncharted, it often refers to the leadership with the following key elements (Caldwell 1989; Caldwell & Spinks 1992; Cheng 2002b; Caldwell 2006; Davies & Davies 2006; Eacott 2008a, b):

- a. It is proactive to contextual changes.
- b. It leads the SWOT analysis of internal and external contexts and the positioning or re-positioning of the institution in a changing environment.
- c. It leads the planning and management of the key strategies or action programmes for effectiveness, survival and development of the institution in meeting the contextual challenges.
- d. It leads the institution to implement these strategies and evaluate their impacts to inform the next planning cycle.

This paper aims to explore how the contextual challenges are related to the emerging and changing concept of strategic leadership in education and then to propose a new typology of models for educators, leaders, policymakers and scholars to understand and analyse the complicated nature and practice of strategic leadership in a changing environment, particularly one with numerous educational reforms.

### ***Challenges from New Education Visions for the Future***

In facing the rapid changes and global challenges from economic development and cultural and political transformations at the turn of new century, many countries across the world have proposed new education visions and long-term aims to prepare their new generation for the future in the global competitive environment (Waters 1995; Brown & Lauder 1996; Brown 1999; Cheng & Townsend 2000). Education leaders have to echo these new national visions and goals and consider changes in the aims, content, process and practice of their schools. How should they strategically lead their teachers, students and other stakeholders to face up to the new changes and pursue a new education that is relevant to the future? What are the implications for their leadership?

### ***Challenges from Privatisation and Marketisation***

Many countries have proposed various initiatives to shift the full public funding model of education to privatisation and marketisation as one of the major approaches to expanding and improving education (Cheng 2007; Cheng & Tam 2007). In such a trend, some critical issues are emerging to challenge school leaders. For example, how can school leaders identify and prioritise the strategic stakeholders of their schools they must satisfy in order to maintain their school competitiveness in a market environment? How can they deal with the diverse and even conflicting expectations of different school stakeholders regarding the aims, content, practice and outcomes of school education? How can their schools perform better than other schools in competing for resources and survival? In facing these challenges, people have put more emphasis on strategic thinking, positioning, branding, and organisational learning to deal with the changes and challenges from the external environment (Caldwell & Spinks 1992; Cousins 1996; Fullan 1996; Leithwood, Tomlinson & Gene 1996; Aaker & Joachimsthaler 2000).

### ***Challenges from Parental and Community Involvement***

Since the late 1980s, many more opportunities have been created for parental and community involvement in school management in the Asia-Pacific region. This move has also increased the complexity, ambiguities and uncertainties in the political dimension of school organisation. How can school leaders strategically lead these key stakeholders to build up alliances, balance diverse interests between parties, and resolve conflicts to bring in benefits and resources to their schools? It is a strategic issue in leadership. Political leadership and environmental leadership may become much crucial than previously (Goldring & Rallis 1993; Bolman & Deal 1997).

### ***Challenges from Ensuring Quality and Accountability***

Maintaining daily functioning is now not sufficient to satisfy the need of diverse stakeholders for high-quality education in a changing environment. As mentioned above, there has been a shift of emphasis from school maintenance to school quality and accountability in practices of educational leadership (George 1992; Goetsch & Davis 1994; Cheng 1997). How can education leaders ensure education quality and accountability for the public? As part of quality management, how can they strategically establish good public relations and market the school's strengths and image to ensure stakeholders' satisfaction with the quality of their education services (Goldring & Sullivan 1996; Cheng 2002a)?

### ***Challenges from School-Based Management and Human Initiative***

Since the 1990s, one international trend in educational administration has been the movement from external control to school-based management. The impacts of such a change are inevitably significant to school leadership. For example, how can school leaders strategically lead the new political and social environment, involving diverse internal and external school stakeholders, and facilitate participative management in their schools? Parallel with the decentralisation of authority to the school-site level, accountability of the school to the public for academic performance and fiscal use is also an emerging demand on school leadership. How can school leaders manage in a way that will improve results? Participative or collaborative leadership is necessary for building up a community of leaders and promoting human initiative and creativity among members. How can school leaders proactively develop such an important dimension of new leadership (Telford 1996; Leithwood & Duke 1999)?

### ***Challenges from Continuing School and Staff Development***

There is a shift of emphasis of school leadership from school improvement to continuing school and staff development. Since education changes are ongoing in a changing environment, there is a strong need for continuous school development and the lifelong professional development of school practitioners (Elliott & Morris 2001). How can school leaders strategically build up a new culture of continuous school development and lifelong staff development among their colleagues and related school stakeholders (Cheng 2001c)? How can they develop their schools as learning organisations that can support all types of learning and development (Senge, Cambron-McCabe, Lucas, Smith, Dutton and Kleiner 2000)? How can school leaders build up a knowledge-management system within their schools that encourages action learning, accumulates experiences and knowledge from daily practices, and informs the further development of staff?

### ***Challenges from Technological and Cultural Changes***

A clear shift of emphasis from using simplistic techniques towards applying sophisticated technology in educational leadership and administration can be observed in educational reforms in the region. Management technologies such as strategic management, development planning, participative management and quality assurance, have been increasingly emphasised since the late 1980s (Caldwell & Spinks 1992; Goddard & Leask 1992; MacGilchrist, Mortimore, Savage and Beresford 1995; Bush & Coleman 2000). Moreover, rapid developments in information technology are having an undeniable impact on education. Its wide use in teaching, learning and management may enhance educational effectiveness and inevitably form a central place in ongoing educational reforms (Education and Manpower 1998; Education Bureau 2007). How to lead the implementation of IT in education as well as the related paradigm shift in teaching and learning is a new strategic issue for school leaders in most countries. How can school leaders strategically facilitate such effective technological and cultural changes in different aspects of their schools (Levy 1986; Ng & Cheng 1995, 1996)?

### ***Implications for Strategic Leadership***

Among the contextual challenges apparent since the early 1990s, there has been a strong demand for a paradigm shift in school leadership in general (Cheng 2002a) and an emphasis on strategic leadership in particular (Davies 2003, 2006; Eacott 2008a, b). From the above discussion, the implications from the contextual changes for emergence and development of strategic leadership are substantial, multiple and fundamental in terms of new visions, increasing competition, new positioning, closer interfacing and social networking, stakeholders' expectations, school accountability, participation in school management, multilevel developments, and changes and paradigm shifts, as summarised in Table 1.

**Table 1:** Contextual changes and strategic leadership in education

Contextual changes and challenges		Implications for strategic leadership
From traditional focus	To new focus	
Short-term achievement	New education visions for the future	<ul style="list-style-type: none"> <li>● <b>New visions:</b> Leading the formulation and implementation of new educational visions and aims at the school level</li> </ul>
Public funding	Privatisation and marketisation	<ul style="list-style-type: none"> <li>● <b>Increasing competition:</b> Leading the school to face up to external challenges and competitions for resources and survival</li> <li>● <b>New positioning:</b> Leading the school re-positioning and organisational learning in a competitive market</li> </ul>
Isolated school management	Parental and community involvement	<ul style="list-style-type: none"> <li>● <b>Close interface:</b> Leading parents and the community for partnership and collaboration</li> <li>● <b>Social networking:</b> Leading a social network and building up alliances</li> </ul>
School maintenance	School quality and accountability	<ul style="list-style-type: none"> <li>● <b>Stakeholders' expectations:</b> Leading and satisfying diverse stakeholders' expectations</li> <li>● <b>Accountability:</b> Leading school accountability to multiple internal and external stakeholders</li> </ul>
External structural control	School-based management and human initiative	<ul style="list-style-type: none"> <li>● <b>Participation:</b> Leading collaboration and participation of multiple stakeholders in school management</li> <li>● Leading and developing a community of leaders within the school School improvement</li> </ul>
School improvement	Continuing school and staff development	<ul style="list-style-type: none"> <li>● <b>Multi-level developments:</b> Leading multi-level developments, including individual staff, groups, the school and the community</li> </ul>
Application of simplistic techniques	Technological and cultural changes	<ul style="list-style-type: none"> <li>● <b>Changes and paradigm shifts:</b> Leading the implementation of technological and cultural changes and paradigm shifts in education and management</li> </ul>

For different leaders in different contexts, their SWOT analyses of the contextual changes and challenges as well as their leadership responses to these implications may be very different. Therefore the styles of their strategic leadership and related strategy to lead their educational institutions may be very diverse. It is also not a surprise that the diversity in contemporary conceptualisations of strategy and strategic leadership in education reflects the increasing complexity and uncertainty in the relationship between the changing context and leadership (Cheng 2002b; Eacott 2008a, b).

## A Topology of Three-Wave Models of Strategic Leadership in Education

The further discussion of contextual changes and development of strategic leadership in education can be in light of the waves of educational reforms in different parts of the world (Cheng 2003, 2005a). It will provide a more comprehensive picture for us to understand the paradigmatic diversities in conceptualisation and practice of strategic leadership in education.

Since the late 1980s, educational reforms have experienced three waves of movements: the effective school movement, quality school movements and world-class school movements (Cheng 2001b, 2005a). Each wave of reforms works within its own paradigm in conceptualising the nature of education and leadership and formulating related strategies and initiatives for the improvement of educational practice at system, site and operational levels. When there is a transition of educational reforms from one wave to the other, there will be paradigm shifts in conceptualisation and practice of learning, teaching and leadership (Cheng 2003). The three waves of educational reforms provide a new typology of three-wave models to conceptualise strategic leadership in education into three paradigms: (1) Internal Strategic Leadership; (2) Interface Strategic Leadership and (3) Future Strategic Leadership. The major characteristics of each model or paradigm of strategic leadership are completely different from each other, as summarised in Table 2 and explained below.

**Table 2:** Three-wave models of strategic leadership in education

	First-wave model	Second-wave model	Third-wave model
<b>About the education environment</b>	<ul style="list-style-type: none"> <li>● Maintaining an industrial society</li> <li>● Comparatively stable and predictable with few uncertainties and little competition</li> <li>● Education provision and content under centralised manpower planning</li> <li>● School management under external control by bureaucracies</li> <li>● Little school autonomy</li> </ul>	<ul style="list-style-type: none"> <li>● Serving a commercial and consumption-driven society</li> <li>● Unstable and fast changing with lots of uncertainties and competition</li> <li>● Education provision and content mainly driven by competition and marketisation</li> <li>● School-based management with accountability framework and</li> </ul>	<ul style="list-style-type: none"> <li>● Towards a life-long learning and multiple development society</li> <li>● Fast changing with impacts from internationalisation and technology advances</li> <li>● Education provision and content mainly characterised by globalisation, localisation and individualisation</li> <li>● Towards independent world-</li> </ul>

		<p>stakeholder participation</p> <ul style="list-style-type: none"> <li>● Bounded school autonomy with central monitoring and external review</li> </ul>	<p>class school management with both local and global relevance</p> <ul style="list-style-type: none"> <li>● School autonomy with local and international benchmarking</li> </ul>
<b>Movements and reforms</b>	<p><b>Effective school movements:</b> To improve the internal process and performance of schools in order to enhance the achievements of planned goals of education</p>	<p><b>Quality school movements:</b> To ensure the quality and accountability of educational services provided by the school meeting the multiple stakeholders' expectations and needs</p>	<p><b>World-class school movements:</b> To ensure the relevance and world-class standards of education to the multiple and sustainable developments of students and society for the future in globalisation</p>
<b>Nature of learning</b>	<p>A process of student receiving knowledge, skills and cultural values from teachers and curriculum</p>	<p>A process of student receiving a service provided by the school and teachers</p>	<p>A process of student developing contextualised multiple intelligences for multiple and sustainable developments</p>
<b>Positioning of the education institution</b>	<p>Delivery of the planned knowledge, skills and cultural values from teachers and curriculum to students in a comparably stable society</p>	<p>Provision of a service to satisfy the needs and expectations of stakeholders in a competitive market</p>	<p>Facilitating of multiple and sustainable developments of students and the society in a context of globalisation and change</p>
<b>Conception of effectiveness</b>	<p><b>Internal effectiveness:</b> As achievement of planned goals and tasks of delivery of knowledge, skills and values in learning, teaching and schooling</p>	<p><b>Interface effectiveness:</b> As satisfaction of stakeholders with the educational services, including the education process and outcomes; and as accountability to the public</p>	<p><b>Future effectiveness:</b> As relevance to the sustainable and multiple developments of individuals, the community and society for the future</p>
<b>Nature of competition</b>	<p>Competition is bounded and mainly controlled by the central bureaucracy and its given standards</p>	<p>Competition among educational institutions is serious for resources and survival in an open</p>	<p>Competition is related to long-term development locally, regionally and globally instead of short-term</p>

		market, particularly in a context of student population decline	achievement locally
<b>Demand for sustainability</b>	Sustainability may not be a major concern in a stable education environment	In serious competition, short-term survival often gets more concerns than sustainability; elimination often happens.	Sustainability of not only the institution but also staff, students and the community is a major concern
<b>Key features of strategy</b>	<b>Internal improvement strategy:</b> <ul style="list-style-type: none"> <li>● Technical rationality in SWOT and planning</li> <li>● Goal achievement</li> <li>● Operational improvement in education</li> <li>● Bureaucratic obligation</li> <li>● Short-term orientation for internal improvement</li> </ul>	<b>Interface satisfaction strategy:</b> <ul style="list-style-type: none"> <li>● Market rationality in SWOT and planning</li> <li>● Competition for survival</li> <li>● Client satisfaction with education services</li> <li>● Cost–return calculation</li> <li>● Short-term or middle-term orientation for market success</li> </ul>	<b>Future development strategy:</b> <ul style="list-style-type: none"> <li>● Future relevance rationality in SWOT and planning</li> <li>● Sustainable development</li> <li>● Globalisation, localisation and individualisation in education</li> <li>● Unbounded opportunities for life-long learning</li> <li>● Long-term orientation for multiple development</li> </ul>
<b>Role of strategic leadership</b>	<b>Internal strategic leadership:</b> with focus on internal improvements for achieving planned goals	<b>Interface strategic leadership:</b> with focus on competition in the market and satisfaction of stakeholders	<b>Future strategic leadership:</b> with focus on facilitating multiple and sustainable developments of students, teachers and the school
<b>Strategic concerns in leadership</b>	<ul style="list-style-type: none"> <li>● How can the internal processes including learning, teaching and management be organised technically well to deliver the planned knowledge, skills and values?</li> <li>● How can the delivery of knowledge and skills from teachers and curriculum to students be ensured through the practical</li> </ul>	<ul style="list-style-type: none"> <li>● How should the school position itself and ensure its provision of services competitive in the education market?</li> <li>● How can the performance of teaching and the outcomes of learning meet the stakeholders’ expectations and needs well?</li> </ul>	<ul style="list-style-type: none"> <li>● How can the school make a paradigm shift in learning, teaching and management possible towards globalisation, localisation and individualisation?</li> <li>● How can the school maximise students’ learning opportunities through the IT</li> </ul>

improvement of schooling, teaching and learning?

- How can the school environment and teachers' teaching be practically and technically improved and developed in a given time period and allocated resources to meet bureaucratic expectations?
- How can students progress well in the planned curriculum and achieve at a higher standard in the public examinations?
- How can the internal process be operationally changed to maximise the use of allocated resources?

- How can the education services be ensured accountable to the public and stakeholders through various types of packaging, monitoring and reporting?
- How can the school expand its influence on its interface and stakeholders to ensure support to its survival and development through activities of branding, marketing, partnership and public relationship?
- How can more external resources and stronger network be achieved to support the school?

environment, networking, and paradigm shifts in teaching and schooling?

- How can the school facilitate and sustain students' self-learning as potentially lifelong?
- How can students' ability to globalise, localise and individualise their own learning be well developed?
- How can students' contextualised multiple intelligences be continuously well developed?
- How can various types of intellectual resources be achieved globally and locally to support world-class teaching and learning?

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#### Potential limitations

- Too inward looking in planning and action, away from the external context
- Narrow focus on technical and operational aspects
- Reactive to central instruction and guidance
- Ignores the changing environment and stakeholders' expectations
- Too short-term-oriented
- Not very strategic
- Too market driven in planning and action, away from the core values and meaning of education
- Too focused on competitions, survival and public relations instead of education
- Reactive to stakeholders' short-term diverse needs
- Ignores long-term and sustainable development
- Ignores the relevance of educational services to the future of students and the society at large
- Not very forward looking
- Too forward-looking in planning and action, away from the reality in practice
- Not only a paradigm shift in leadership but also a cultural and technological system change
- Difficult to practise and implement
- Ignores the existing market needs and stakeholders' expectations
- Not very technically efficient or not very market strategic

### ***First-Wave Model: Internal Strategic Leadership***

Since the 1980s, there have been effective school movements in different parts of the world including the UK, USA and Australia as well as in many Asian and European countries or cities (Townsend, Avalos, Caldwell, Cheng, Fleisch, Moos, Stoll, Stringfield, Sundell, Tam, Taylor & Teddlie 2007). The education environment is often assumed to be comparatively stable and predictable with few uncertainties and little competition, and the role of education aims to provide the necessary manpower to maintain or serve an industrial society (Blackledge & Hunt 1985). The provision and content of education are often under centralised manpower planning, and the school management is under external control by central bureaucracies with little school autonomy. It is assumed that education is knowledge delivery and learning is mainly a process of students receiving knowledge, skills and cultural values from teachers and the curriculum.

The first wave of educational reforms aims at improving the internal processes in learning, teaching and management and enhancing the internal effectiveness of schools in achieving pre-planned educational aims and curriculum targets. For example, in Hong Kong, India, South Korea, Singapore, Taiwan, Malaysia and mainland China numerous initiatives were targeted at improving key features of internal school processes, some of which were changes in school management, teacher quality, curriculum design, teaching methods, approaches to evaluation, resourcing, and the environment for teaching and learning (Gopinathan & Ho 2000; Kim 2000; Tang & Wu 2000; Abdullah 2001; Cheng 2001a; Rajput 2001; MacBeath 2007).

Within the first-wave model, the school is often positioned as a deliverer of the planned knowledge, skills and cultural values from teachers and curriculum to students in a comparably stable society. School effectiveness is a kind of *internal effectiveness* defined by the achievement of planned goals and tasks of delivery of knowledge, skills and values in learning, teaching and schooling.

Under central manpower planning, competition between schools is comparatively bounded and mainly controlled by the central bureaucracy and its given regulations and standards. Correspondingly, school sustainability may not be a major concern of school leaders in such a stable education environment. The school strategy developed by leaders is a kind of *Internal Improvement Strategy*, mainly based on a kind of *technical rationality* in SWOT analysis and planning, with a focus on the technical improvement of internal operations in teaching, learning and management to enhance the achievement of planned school goals. The key initiatives of the school strategy are often oriented towards the short term and narrowed in obligation to bureaucratic regulations (Eacott 2008a).

In the first-wave model, the role of strategic leadership is mainly a form of *internal leadership* with strategies focused on assuring internal school effectiveness through improving school performance in general and enhancing contents, methods and processes of teaching and learning in particular. When internal strategic leadership is practised, there is frequent reference to concepts such as instructional leadership, curriculum leadership, structural leadership, human leadership and micro-political leadership (Cheng 2003, 2005a). The strategic concerns in leadership may include the following questions:

- How can internal processes including learning, teaching and management be organised technically well to deliver the planned knowledge, skills and values?
- How can the delivery of knowledge and skills from teachers and curriculum to students be ensured through the practical improvement of schooling, teaching and learning?

- How can the school environment and teachers' teaching be practically and technically improved and developed in a given time period and allocated resources to meet bureaucratic expectations?
- How can students progress well in the planned curriculum and achieve at a higher standard in the public examinations?
- How can the internal process be operationally changed to maximise the use of allocated resources?

The first-wave model of internal strategic leadership has its limitations. It may be too inward looking in development planning and action without taking the complexities, diversities, expectations and influences of the external environment and stakeholders into full consideration. The positioning of leadership may be too narrowly focused on the technical and operational aspects of educational processes or the school organisation. To a great extent, it may be reactive to the instruction and guidance of the central bureaucracies, ignoring the changing environment and stakeholders' expectations. Given such a technical, short-term and internal orientation, the first-wave model of leadership in education is often not perceived as being very strategic.

Since the late 1980s, there have been numerous initiatives and reforms of the first wave implemented in different parts of the world, as mentioned above. Unfortunately, the results of these efforts were very limited and could not satisfy the increasing needs and expectations of the public. People began to doubt the efficiency of these improvement initiatives, and the internal leadership related to them, in meeting the diverse needs and expectations of parents, students, employers, policy-makers and other concerned members of the community. How could school leaders ensure that the education service provided was accountable to the public? How could they ensure that the education practices and outcomes were relevant to the changing demands of the local community? All these challenges were fundamentally concerned with the interface between education institutions and the community. It meant that strategic leadership should be focused not only on internal process improvement but also the interface issue of meeting the stakeholders' satisfaction and ensuring accountability to the community.

### ***Second-Wave Model: Interface Strategic Leadership***

In the 1990s, in response to concerns about educational accountability to the public and the quality of education as satisfying stakeholders' expectations, the second wave of educational reforms emerged internationally. Most reform efforts were directed at ensuring the quality and accountability of schools to the internal and external stakeholders (see, for example, Coulson 1999; Evans 1999; Headington 2000; Mahony & Hextall 2000; Goertz & Duffy 2001; Heller 2001).

In some areas of the world, such as Hong Kong, India, Singapore, Taiwan, the UK and the USA, there was a growing trend towards *quality education or competitive school movements* emphasising quality assurance, school monitoring and review, parental choice, student coupons, marketisation, parental and community involvement in governance, school charters and performance-based funding (Cheng & Townsend 2000; Mukhopadhyay 2001; Mok, Gurr, Izawa, Knipprath, Lee, Mel, Palmer, Shan & Zhang 2003; Mohandas, Meng & Keeves 2003; Pang, Isawa, Kim, Knipprath, Mel & Palmer 2003).

In the second wave, education is often seen as a provision of service to multiple stakeholders in a commercial and consumption society, and the nature of learning is a process for students

who are receiving a service. The school is positioned as a provider of educational services the quality of which should satisfy the expectations and needs of key stakeholders – parents, employers and other social constituencies as well as students themselves. This wave emphasises *interface effectiveness* between a school and the community, typically defined by stakeholders' satisfaction, market competition and accountability to the public.

The education environment in the second-wave reforms becomes very unstable and fast changing, with lots of uncertainties and competition. The education provision and content are mainly driven by changing market needs and diverse stakeholder expectations. To meet the changing needs and external challenges, school-based management is allowed and implemented with an accountability framework with the participation of key stakeholders such as staff, parents, alumni and community leaders. Schools have some bounded autonomy with central monitoring and external review. Competition among schools for resources and survival in an open market is serious, particularly in a context of student population decline. In a context of serious competition, school elimination often happens and frightens every school and all its school leaders and members. It is not a surprise that the short-term survival of schools often elicits more concern than their long-term sustainability in development (Cheng & Walker 2008; Cheng 2009).

The school strategy developed by the school leaders is a kind of *Interface Satisfaction Strategy*, mainly based the *market rationality* in the SWOT analysis and strategic planning with focus on competition for survival and resources, client satisfaction with education services, and cost-return calculation. The initiatives are often oriented towards the short term, if not the middle term, for market success.

Strategic leadership in the second wave is a form of *interface leadership* with a focus on ensuring interface school effectiveness. Implicitly or explicitly the role of strategic leadership within this paradigm is to ensure accountability to the public, add value to educational services, enhance the marketability of educational provision, and ensure that learning, teaching and schooling meets stakeholders' expectations. How to manage the interface between schools and the local community successfully in a competitive and fast-changing environment proves to be a crucial challenge to school leaders. The commonly used concepts of second-wave strategic leadership are substantively different from those in the first wave, including environmental leadership, public relations leadership and brand leadership (Aaker & Joachimsthaler 2000; Cheng 2003, 2005a). Some of the strategic concerns of leadership in education include the following:

- How should the school position itself and ensure its provision of services is competitive in the education market?
- How can the performance of teaching and the outcomes of learning meet the stakeholders' expectations and needs well?
- How can it be ensured that the education services are accountable to the public and stakeholders through various types of packaging, monitoring and reporting?
- How can the school expand its influence on its interface and stakeholders to ensure support to its survival and development through activities of branding, marketing, partnership and public relationship?
- How can more external resources and a stronger network be achieved to support the school?

There are some limitations in the conceptualisation and practice of the second-wave model of strategic leadership. It may be too market-driven in the SWOT analysis, strategic planning and related action programmes, which may deviate from the core values and meanings of education. The leadership initiatives may be focused too much on school competition, market survival and public relations instead of education activities as the core business. Sometimes, the leadership and strategy may be only reactive to the stakeholders' various short-term needs without considering long-term and sustainable development of students, staff, the school, the profession and the community. In particular, it may ignore the relevance of educational services to the future of students and the society at large, and the second-wave leadership itself may become 'market strategic' but not very forward looking.

### ***Third-Wave Model: Future Strategic Leadership***

At the turn of new millennium, the impact of rapid globalisation, far-reaching influences of information technology (IT) and urgent demands for economic and social developments in international competition stimulated deep reflection on educational reform. It is often assumed that the world is moving towards a life-long learning and multiple-development society, and the environment is fast changing with impacts from internationalisation and advances in technology. To ensure that the younger generation could meet the future challenges and needs of rapid transformations in an era of globalisation and IT, researchers, policy-makers and stakeholders in many countries argued for a paradigm shift in learning and teaching. They advocated a reform of the aims, content, practice and management of education, in order to ensure the relevance of students' learning for the future (see, e.g., Burbules & Torres 2000; Cheng 2000a, 2000b; Stromquist & Monkman 2000; Daun 2002; Cheng 2003; Ramirez & Chan-Tiberghien 2003).

In such a global context, there is an emerging third wave of educational reform, with heavy emphasis on *future effectiveness*, often defined by the relevance of education to the future developments of individuals and their society. In particular, this is seen as meeting the changed purposes and functions of education in the twenty-first century, and a new paradigm of education which embraces contextualised multiple intelligences, globalisation, localisation and individualisation (Baker & Begg 2003; Maclean 2003; Cheng 2005a). Different from the first and second waves, the nature of learning in the third wave is to develop contextualised multiple intelligences (CMI) of learners which are relevant to multiple and sustainable developments (including technological, economic, social, political, cultural and learning developments) in both local and global contexts (Cheng 2005b).

As a consequence of globalisation and international competition, this third wave of educational reforms is driven by the notion of *world-class education movements*. Effectiveness and improvement of education are thus defined by world-class standards and global comparability so as to ensure that the future of both student and social development is sustainable in such a challenging era. Schools may have sufficient autonomy to achieve their own visions for the future with local and international benchmarking in management and educational practice. The positioning of the school may be as a world-class institution for facilitating the multiple and sustainable developments of students and the society in a context of globalisation and change.

In the third wave, there may be still some competition among schools or other educational institutions, but they may be related to the long-term development locally, regionally and globally instead of short-term achievement locally. Sustainability of not only the school but

also staff, students and the community is a major concern in the leadership. The strategy developed by the leaders is a kind of *Future Development Strategy* based on the future relevance rationality in the SWOT analysis and strategic planning, with focus on the sustainable development of students, teachers and the school; globalisation, localisation and individualisation in education; and unbounded opportunities for life-long learning. The initiatives are often oriented towards the long-term for multiple developments at different levels.

In the third wave, strategic leadership assumes the character of *future leadership* with a focus on the pursuit of a new vision and new aims for education; a paradigm shift in learning, teaching and curriculum; lifelong learning; sustainable development; global networking; an international outlook; and the integration of IT in education (Cheng 2001a; Pefianco, Curtis & Keeves 2003; Peterson 2003). How to maximise learning opportunities for students through 'triplisation in education' (i.e. as an integrative process of globalisation, localisation and individualisation in education) is a key challenge inviting a new paradigm of school leadership for the third wave of educational reforms (Cheng 2005a). So, new concepts of school leadership are emerging in the third wave, including triplisation leadership, multi-level learning leadership, sustainable development leadership, and multiple-thinking leadership (Cheng, forthcoming). The common strategic concerns of school leaders are completely different from those in the first and second waves, including some of the following questions:

- How can the school make a paradigm shift in learning, teaching and management towards globalisation, localisation and individualisation possible, practically and culturally?
- How can the school maximise students' learning opportunities through establishing the IT environment, networking, and paradigm shifts in teaching and schooling?
- How can schools facilitate and sustain the development of students' self-learning as potentially lifelong?
- How can students' ability to globalise, localise and individualise their own learning be well developed?
- How can students' contextualised multiple intelligences be continuously well developed?
- How can various types of intellectual resources be achieved globally and locally to support world-class teaching and learning?

As a new paradigm, the third-wave model of strategic leadership also has its own limitations in conceptualisation and practice. It may be too forward looking in its SWOT analysis, strategic planning and action programmes, which may be too far away from the reality in practice and the context, and result in serious difficulties and failure in implementation. The implementation of the third-wave leadership depends heavily not only on a paradigm shift in leadership itself but also on cultural and technological support from the system change. This model may ignore the existing market needs and stakeholders' expectations and result in strong resistance and difficulty in practice. In particular, at the beginning of its development, this model of strategic leadership may be considered as not so technically efficient or not so market strategic.

## Conclusions

From the above discussion, we can see that the challenges from contextual changes have tremendously changed the nature and practice of education as well as leadership in education. The new visions of education, increasing marketisation and competition, close interface with the community, enhanced stakeholders' expectations, external participation and collaboration, multi-level developments, and technological and cultural changes all demand education leaders to be more strategic and sensitive to contextual changes (Table 1). They are expected to perform strategic leadership with new thinking, broad horizons, forward-looking and innovative perspectives, strong social networks, and proactive action programmes.

The three-wave models of strategic leadership in fact represent a typology of different paradigms employed in the conceptualisation of the nature and practice of strategic leadership in education in facing the increasing impacts and complexities of contextual changes and educational reforms. Table 2 has summarised the major characteristics of these three models of strategic leadership. It provides a new typology for conceptualising, understanding and analysing the paradigmatic diversities in strategic leadership.

Based on different models and their related paradigms in education and reforms, strategic leadership can be conceptualised as internal strategic leadership, interface strategic leadership and future strategic leadership. As strategic leadership, leaders in education need to face up to contextual challenges and develop appropriate the positioning and strategy for their schools to be effective in achieving their aims, competitive in surviving a market environment, and sustainable in pursuing the future for their students, teachers, schools and the community. In different models, strategic leadership in education is characterised by different assumptions of the education environment, types of education reforms and movements, positioning of the education institution, nature of learning, conception of effectiveness, nature of competition and demand for sustainability. Correspondingly, the key features of strategy, leadership role, and strategic concerns of leadership are completely different across these three models.

In the topology of strategic leadership, some leaders may focus their leadership more on the internal improvement of their schools to achieve planned aims; some more on the market competition and the interface with key stakeholders and the community; and some more on the future relevance of education to sustainable and multiple developments. It is also not a surprise that some leaders perform their strategic leadership in a mix of different models. It should be noted that, in this typology, the three waves may happen in sequence or in parallel, but they can be cumulative and each subsequent wave may add to the previous ones and hence to the complexity of the environment in which schools leaders practise their strategic leadership.

Although internal strategic leadership, interface strategic leadership and future strategic leadership are based on different paradigms and they have their own features and limitations, all of them are important and necessary to provide us a comprehensive framework to consider and practise strategic leadership in a complicated changing education environment. To a great extent, they are mutually supplementary to each other, taking internal improvement, interface satisfaction and accountability, and future relevance into consideration. If a school has to pursue not only internal effectiveness but also interface effectiveness and future effectiveness, the strategic leadership of this school should also

include the key elements of internal leadership, interface leadership and future leadership as a whole. It may be named as *Total Strategic Leadership in Education*.

From this line of thinking, the ongoing efforts in development of strategic leadership in education should focus not only on internal and interface strategic leadership but also on future strategic leadership in order to achieve total effectiveness for school education. All in all, how to develop *Total Strategic Leaders* in education is a fundamental question that must be fully addressed by education reformers and scholars. A point of departure is to have a better understanding of the three waves of educational reforms in relation to strategic leadership in education and then draw policy implications for guiding the efforts to rationalise education reform and develop strategic leaders in order to cope with the various impacts and challenges in education. It is hoped that the typology of three-wave models can provide a new comprehensive framework for educators, leaders, researchers and policy-makers in different parts of the world to understand and practise strategic leadership in education.

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Blue Ocean Strategy is a strategic planning model that emerged in a book by the same name in 2005. The book titled "Blue Ocean Strategy: How to Create Uncontested Market Space and Make Competition Irrelevant" was written by W. Chan Kim and Renée Mauborgne, professors at the European Institute of Business Administration (INSEAD). The idea behind Blue Ocean Strategy is for organizations to develop in "uncontested market space" (e.g. a blue ocean) instead of a market space that is either developed or saturated (e.g. a red ocean). Real-time strategic planning involves three levels of strategy: organizational, programmatic, and operational. For the first level, you'll define the organization's mission, vision, market position, competitors, trends, etc.