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The Management and Leadership of Educational Marketing: Research, Practice and Applications

Izhar Oplatka
Jane Hemsley-Brown
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THE MANAGEMENT AND LEADERSHIP OF EDUCATIONAL MARKETING: RESEARCH, PRACTICE AND APPLICATIONS

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VOLUME 15

THE MANAGEMENT AND LEADERSHIP OF EDUCATIONAL MARKETING: RESEARCH, PRACTICE AND APPLICATIONS

EDITED BY

IZHAR OPLATKA
Tel Aviv University, Tel Aviv, Israel

JANE HEMSLEY-BROWN
University of Surrey, Guildford, Surrey, UK

Emerald

United Kingdom – North America – Japan
India – Malaysia – China

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LIST OF CONTRIBUTORS

Tristan Bunnell	Copenhagen International School, Copenhagen, Denmark
Nick Foskett	Keele University, Keele, UK
Jane Hemsley-Brown	Surrey Business School, University of Surrey, Guildford, UK
Matthew Linick	College of Education, University of Illinois Urbana-Champaign, Champaign, IL, USA
Christopher Lubienski	College of Education, University of Illinois Urbana-Champaign, Champaign, IL, USA
Felix Maringe	School of Education, University of Witwatersrand, Johannesburg, South Africa
Izhar Oplatka	The School of Education, Tel Aviv University, Tel Aviv, Israel
Julie Robson	Business School, Bournemouth University, Bournemouth, UK
James Seligman	Southampton Management School, University of Southampton, Southampton, UK
Christopher Allen Stachowski	Whitireia Community Polytechnic, Wellington, New Zealand; Otago University, Dunedin, New Zealand
Dorit Tubin	Department of Education, Ben Gurion University of the Negev, Beer-Sheva, Israel

Hsiao-Pei (Sophie) Yang Faculty of Business, Environment and Society, Coventry University, Coventry, UK

Miri Yemini School of Education, Tel Aviv University, Tel Aviv, Israel

J. G. York College of Education, University of Illinois Urbana-Champaign, Champaign, IL, USA

INTRODUCTION

THE RESEARCH ON SCHOOL MARKETING: CURRENT ISSUES AND FUTURE DIRECTIONS – AN UPDATED VERSION

Izhar Oplatka and Jane Hemsley-Brown

ABSTRACT

This review provides a synthesis of the scholarship that has sought to expand understanding of educational marketing practice in schools. The following research questions guided this review: (1) what are the common themes and characteristics that emerge from research about marketing in schools? (2) What remains underdeveloped in the characterization of the school marketing and what are the topics for future research? Based on 25 studies identified as pertinent for the current review, the following topics are discussed: marketing perceptions, marketing planning, marketing strategies, and promotion. The chapter concludes by providing an analysis of the limitations of the current research and discussing future directions for research on school marketing.

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PERSONAL INTRODUCTION

In 2004, we published a paper in the *Journal of Educational Administration* in which we reviewed the state of art in the field of educational marketing, in general, and of school marketing, in particular. Eight years later, we have decided to update this review and trace the scholarly development in the area of school marketing. We found nine papers related to this area that were published in refereed journals between 2005 and 2011, most of which were from countries other than the United Kingdom, the country from which many papers about school marketing have been written in our 2004 review. But, eight years later, we believe that our major conclusions are still relevant today, especially due to the extremely limited number of studies that have been conducted in the area of school marketing since our review paper was published. The paper is presented here with these new papers.

INTRODUCTION

The introduction of educational markets into compulsory education in many Western countries throughout the 1980s and 1990s (Bell & Rowley, 2002; Cookson, 1994; Gewirtz, Ball, & Bowe, 1995; Levin, 2001; Oplatka, 2002a; Taylor, 2001) has led to more competitive environments for schools (Foskett, 2002). With the market comes marketization, a process that is largely characterized by an increased priority being given by school principals to the marketing of their schools (Foskett, 2002; Hanson, 1996; Maguire, Ball, & Mcrae, 2001). The survival of many schools is dependent on their capacity to maintain or increase the school's "market share" of pupils, results, and resources, and to market their school to the external environment (Davis & Ellison, 1997; Grace, 1995; Holcomb, 1993; Kotler & Fox, 1995). Indeed, the establishment of educational markets urged schools to incorporate various forms of marketing perspective into their strategy in order to successfully recruit students in the new competitive environment (e.g., Foskett, 1998; James & Phillips, 1995; Levin, 2001; Oplatka, 2002a; Woods, Bagley, & Glatter, 1996).

However, despite the substantial literature on markets in education, market structures, and implications for teaching and learning, scholarship to provide analysis of the type of educational marketing remains un-synthesized and un-theorized – Foskett's (2002) work is an exception. Most authors focused on choice process and factors (e.g., Foskett & Hemsley-Brown, 2001; Gorard, 1999; Powers & Cookson, 1999) and the impact of parental choice on equality (e.g., Ball, 1994; Gewirtz et al., 1995; Lauder & Hughes, 1999), while the school's responses to market forces received less attention in the literature of educational administration. This omission appears to relate particularly to our understanding of the impact of market forces on the incorporation of marketing mechanisms within school. We believe that the relative lack of references to marketing elements is likely to prevent holistic conceptualization of recent changes to organizational processes in schools.

This review addresses some of the omissions discussed above by providing a synthesis of the scholarship that has sought to expand understanding of educational marketing practice in schools, by documenting the ways in which elementary (primary) and secondary schools implement their marketing strategies. The synthesis is based on empirical research studies, including case studies that have attempted to characterize the practical implementation of marketing mechanisms in schools worldwide. The following questions guide the review: (1) what are the common themes and characteristics that emerge from the studies about marketing in schools? (2) What remains underdeveloped in the characterization of school marketing and what are the topics for future research?

The chapter begins with an outline of the "ideal" marketing procedures in schools. It then goes on to describe the method for reviewing the research literature and to establish the current state of educational marketing research in the school sector. The last section concentrates on the weaknesses of the current research and suggests future directions.

Normative Recommendations for Educational Marketers

The literature on "educational marketing" originated in the United States and the United Kingdom in the late 1980s was theoretical-normative in nature. It included primarily books and manuals of the "how to market your school" variety which were based on marketing models developed in the noneducation sector (e.g., Gray, 1991; Holcomb, 1993; Kotler & Fox, 1995; Pardey, 1991).

Several definitions have been suggested for the concept of marketing in education that were similar, by and large, to the definitions and conceptualizations of marketing in the context of business and service sector companies. A comprehensive definition of educational marketing is suggested by Kotler and Fox (1995, p. 6) who defined marketing as "the analysis, planning, implementation and control of carefully formulated programs designed to bring about voluntary exchanges of values with a target market to achieve organizational objectives." Similarly, Davis and Ellison (1997, p. 3) defined marketing as "the means by which the school actively communicates and promotes its purpose, values and products to the pupils, parents, staff and wider community." A slightly different definition was proposed by Pardey (1991, p. 12) who argued that marketing is "the process which enables client needs to be identified, anticipated and satisfied, in order that the institution's objectives can be achieved." A similar definition is alluded to by Evans (1995, p. 4) who regards marketing as "the management process of identifying and satisfying the requirements of consumers and society in a sustainable way."

It follows that educational marketing is an indispensable managerial function without which the school could not survive in its current competitive environment, on the grounds that it is not enough for a school to be effective, it also needs to convey an effective image for parents and stakeholders. Marketing is considered to be a holistic management process (Foskett, 2002) aimed at improving effectiveness through the satisfaction of parents' needs and desires rather than just mere selling of products and services or persuasion of clients to buy a specific educational program. In other words, marketing is another managerial philosophy based on the ideal relationships between the school and its community.

Over the last decade a number of different concepts have been used by organizations to engage with their external environments, among them the "production" perspective that assumed that buyers would favor products that are available and affordable. The "product" approach is based on the assumption that buyers will purchase the products that offer the best quality and features; therefore, the organization should focus on product development and improvement (Evans, 1995). In later years the "selling" perspective prevailed, assuming that consumers will not buy unless activities to inform and persuade them to do so are carried out (e.g., advertising and promotion) (Kotler & Armstrong, 1999). In contrast, the marketing perspective holds that "the main task of the institution is to determine the needs and wants of target markets and to satisfy them through the design, communication, pricing and delivery of appropriate and competitively viable programs and services" (Kotler & Fox, 1995, p. 8). In theory, schools adopting the "marketing orientation" are more responsive to parents' and children's needs and desires and attentive to changes in the community needs (Lumby, 1999). The focus in these schools are parents and children, and their need satisfaction is of high priority and importance (Hanson, 1996; Pardey, 1991).

To this end, the marketing perspective encourages schools to follow several major stages: (1) marketing research and analysis of the environment; (2) formulating a marketing plan and strategy; (3) implementing the marketing mix; and (4) evaluating the marketing process (Davis & Ellison, 1997; Foskett, 2002; Hanson, 1996; Kotler & Armstrong, 1999). Thus, in practical terms, principals that adopt a marketing perspective are expected to implement these stages as well as investigate the needs of parents and pupils. The question of whether schools adopt these theoretically based "recommendations" or not, and how their marketing-like activities are constructed and perceived, is the focus of this review.

Identification and Selection of Papers for Review

The literature that informs this analysis consists of findings from empirical research papers that rely on surveys, documentary analysis, focus groups, and interviews with individuals who employ in, or have contact with elementary and secondary schools in competitive environments. All of the papers are published in the English language, most of which in refereed academic journals, and small part in academic books.

The articles were collected in two-staged processes. The first stage utilized the bibliographic references of articles and books known by the authors to focus on educational marketing (hand searching) and used these references to identify other papers in the field. At this stage most of the published papers gathered were from British journals such as *Educational Management and Administration*, *International Journal of Educational Management*, and *School Leadership and Management*. The second stage aimed to ensure coverage, and comprised a systematic search of library systems databases (AEI; BEI, GoogleScholar) using the search terms "marketing and schools," "educational marketing," "marketing in education," and "markets and schools." ERIC was also searched using the descriptors "marketing the school," "marketing and education," "educational marketing," "marketing the educational institutions," "educational institutions and marketing."

The following rules governed inclusion in this review. First, we sought studies where at least one of the purposes had been to explore the nature of marketing in elementary and/or secondary schools. Second, the review excludes general information about marketing (e.g., "how to market your school" papers) or particular reference to the marketing of higher education institutions. General articles speculating on ideal market characteristics in education were also excluded.

The review covers the period from 1980 onward (to 2002) but most studies and investigations were written in the 1990s – an era of marketization in educational systems worldwide. The review provides most evidence on the topic of incorporation of marketing mechanisms into school structures. The review is not bound by any geographical or national constraints; however, due to policy issues, discussed in the introduction of this chapter, most studies originated in the United Kingdom.

As a result of these search strategies and methods of elimination, 34 research-based publications, which fitted the criteria outlined above, were identified. Their publication dates begin in 1993 and continue to 2011, but most papers appear predominantly in the second half of the 1990s, including research-based studies, mostly qualitative ones, which explore and document the marketing of schools in practice. Among the themes discussed in these papers are "environmental scanning of schools," "marketing strategies," "promotion and public relations," "moral dilemmas," and other forms of school's responses to competition. Interestingly, but hardly surprising given the competitive nature of the British educational system in the 1990s, 18 investigations in this sort of literature were British ones. Others were conducted in the United States (3), Israel (2), Australia (2), New Zealand (3), Taiwan (2), Canada (1), and Pakistan (1). Two papers reported on comparative studies conducted in diverse countries (see appendix for a summary of these papers).

As the field's conceptualization of marketing processes in schools is in its incipient stage, we believe that no universal paradigm or theory exists for guiding our review that is valid in all contexts. Thus, the papers gathered for this review were analyzed as follows: first, "the research purposes," "methods," and "major findings" concerning marketing processes and perceptions in each source were documented and coded. Then, the themes yielded were compared and contrasted in order to identify common and different findings regarding the practice of marketing in schools and its impact on the school's members and stakeholders.

Current Findings on School Marketing

With this overview in mind, we will briefly set out the research purposes and the methodologies that guided the investigations of school marketing. Next, we outline the major elements of educational marketing that were found to prevail in schools, the meaning ascribed to the concept of marketing among educators and its implications for their work.

Notes on Aims and Methodology of the Field

The knowledge base of the research on school marketing has been shaped by two kinds of studies: studies that aimed directly to understand marketing mechanisms within schools and studies that indirectly referred to marketing issues in parallel with other processes in schools engendered or influenced by the introduction of market forces into the educational sector.

Of the first group – direct research – some studies we reviewed, for example, simply aimed to document marketing activities and processes in schools engaging in competitive arenas. Based on models of marketing originating in the noneducation sector as their conceptual frame, the purpose of these, mostly qualitative-explorative studies, has often been to reveal principals' and teachers' perceptions of the concept of marketing and to explore practical elements of the marketing process in schools per se (e.g., describing the marketing mechanisms of a school, analyzing how schools sell themselves, identifying environmental scanning mechanisms in schools, exploring the ways by which school present themselves). These studies have not been primarily concerned with theory-building in the sense of linking variables with patterns of marketing in order to broaden understanding of the context of marketing in schools, but rather take a descriptive approach to the processes explored. Foskett's (1998) study on the development of marketing orientation and culture in schools is an exception.

Given the explorative nature of these initial studies (thus characterized by a relative lack of theoretical and empirical background), it is hardly surprising that most "direct" studies identified in our search used qualitative inquiries which allows deep and abundant description for revealing the complexity and contradictions inherent in social phenomena, from a holistic point of view. The most common method was the semistructured interview with school staff and stakeholders usually conducted in several schools. However, when the subject of interest was the school brochures and advertisements, most researchers used the quantitative content analysis and typically analyzed a large number of documents.

The second group of studies – the indirect research – is composed of various studies that, in general, aimed to understand schools' responses to educational markets, and the incorporation of marketing mechanisms was only one of the outcomes studied. Thus, usually based on a triangulation of quantitative and qualitative methodologies, the focus in several research studies was on understanding the ways schools actively and passively, directly and indirectly responded to the educational marketplace. The reports produced from these studies included, among other things, evidence of impression management and marketing forms, and of the consumer behavior of parents.

Similarly, but from a slightly different standpoint, a number of researchers have sought to understand the impact of school choice on the school's structure and processes, and to determine the extent to which schools have changed as a result of the introduction of educational markets (e.g., Bagley, Woods, & Glatter, 1996; Gewirtz et al., 1995). Notably, these studies conducted mainly in the UK post-1988 Act (which introduced markets in the education sector in this country) were longitudinal in order to trace the impact of the major changes in the schools' environments on the strategic and operational management of the school. Part of their evidence referred to issues of school marketing and changes in rhetoric designed to attract prospective students despite, sometimes, a lack of "real" changes. Their elucidation of marketing perceptions and functioning within schools was of great importance for our review.

It is worth noting, nevertheless, that with the exception of a few studies from both groups (e.g., Furse, 1989; Woods, 1994), most studies used interviews or self-report questionnaires rather than systematic observations to document and outline practical elements of school marketing. This methodological decision is a major weakness of these studies as the documentation of the marketing process in practice is virtually based on subjective interpretations by school members and stakeholders; thus, it may result in a biased, subjective perspective on reality. This shortcoming, we believe, should be borne in mind while reading the findings from these studies set out in this review.

School Marketing: Contradictory Perceptions, Emerging Dilemmas

A major theme discussed and explored in the research on school marketing so far was school members' (mostly principals) and stakeholders' attitudes toward the concept of marketing and its incorporation in education. Based on responses to self-reported questionnaires and open interviews mostly with English principals, three major issues emerged: that marketing is an indispensable organizational activity for competing schools, that marketing as an activity is viewed negatively in education, and that the need to market the school engender major dilemmas for principals and staff.

For principals and even for some teachers in schools, the need to compete for prospective students with other education providers (e.g., secondary school in large cities, Grand Maintained schools – more recently Foundation schools), and in schools facing a decline in enrollments, marketing is conceived of as a vital element in the recruitment of prospective students without which the school may not survive. Principals in England, Israel, and New Zealand highlighted the link between interschools competition and marketing (Ball, 1994; Birch, 1998; Lauder & Hughes, 1999; Oplatka, 2002a). Ball (1994, p. 132), for example, cites a female principal who says that "there is a lot of competition in (the sixth form) … (and) I think we will gradually be spending more money on marketing." Similarly, an Israeli study showed that most principals who describe the relationships among secondary schools in terms of competition, war, struggle, and lack of collaboration considered marketing as a very important part of their role (Oplatka, 2002a).

Along the same lines, two studies in England and Wales found that marketing was perceived to be a mechanism that would ensure that prospective students would choose the school either from its catchment children or from outside this area (Birch, 1998; Herbert, 2000). Interestingly, a study that explored teachers' attitudes toward marketing found that some teachers, mainly young, perceived marketing as inevitable in the competitive environment of English schools (Oplatka, Hemsley-Brown, & Foskett, 2002).

In contrast, when principals and some teachers from less-competitive education arenas (e.g., rural and small town setting, and primary schools) were asked what marketing meant for them, they indicated that there was no need for marketing in their schools. Principals of over-subscribed schools, in particular, were able to resist the pressures of the market due to their good position within it. In these schools marketing activities were unnecessary, as Grace (1995) indicated. An English principal cited in Gewirtz et al.'s (1995) study admitted that if she had to fight for students she would put money into glossy marketing. A similar stance was found amongst Israeli and New Zealand principals (Lauder & Hughes, 1999; Oplatka, 2002a).

Another theme arising from the research on school marketing is educators' belief, even among those who considered marketing as an indispensable function in schools, that marketing is not considered to be compatible with education. In Birch's (1998) study, English principals claimed that a school is not another business to market, but a place of teaching and learning processes. In two other studies conducted in England (Grace, 1995; Oplatka et al., 2002), principals and teachers grudgingly argued that education could not be marketed like business services or products, as is evident in the following verbatim extract:

> Much of what we are being asked to do in terms of marketing and competition is against my basic principals … the process of education is not the same as producing a tin of beans. (A principal's voice, Grace, 1995, p. 136)

> I'm not happy with the idea of advertising, commercializing, considering education to be a product in the same way as sunglasses are a product. (Head of Science, Oplatka et al., 2002, p. 185)

Basically, marketing was considered by English educators to be at odds with moral values and ethical codes which have been historically dominant in English schooling culture (Grace, 1995). Therefore, it is hardly surprising that Gewirtz and colleagues (1995) found that while engaging in marketing activities principals and teachers were likely to apologize and feel discomfort.

We assume that the implicitly negative meaning attached to marketing by teachers and principals is related to their narrow definition and understanding of marketing. As opposed to comprehensive definitions of marketing (e.g., a process, a management function, and a perspective) suggested in the educational marketing literature (e.g., Davis & Ellison, 1997; Hanson, 1996; Kotler & Fox, 1995), principals and teachers frequently described marketing as though it were synonymous with "selling," with an emphasis on advertising, promotional activities, public relations, glossy messages, poaching, and persuasion (Bell, 1999; Gewirtz et al., 1995; James & Phillips, 1995; Foskett, 1998; Oplatka, 2002a). Likewise, the negative meaning attached to marketing seems to derive from principals' and teachers' belief that misleading, even deceptive messages are inevitably embedded in marketing activities. Underpinning this view are phrases and words used by interviewees in several studies with regard to marketing such as "shop window," "there should be some reality behind the promises," and "false messages" (Gewirtz et al., 1995; Oplatka et al., 2002). Grace (1995, p. 136) cited a principal who said, "I'm not against marketing if you market the good things that the school does … what I am against is people who market things that aren't actually true." This citation seems to epitomize principals' and teachers' inaccurate definition of marketing.

Given the negative notion of marketing among school members who are forced to engage with it in their work, it is not unreasonable to find an emergent dilemma reported by many of them worldwide. On one hand, government-originated literature and policy directives imposed the market on schools in countries such as England, Australia, and New Zealand

(Grace, 1995; Levin, 2001). Principals were encouraged, explicitly and implicitly, to market their products and services if they wanted to survive the new competitive environment of the school sector. On the other hand, principals' and teachers' negative definitions of marketing brought about inconsistency between their moral and educational values and policy imperatives. One type of dilemma identified in the research was the extent to which money should be allocated to marketing rather to learning and teaching (Birch, 1998; Grace, 1995). Most interviewees in Birch's (1998) study felt uncomfortable with spending money on glossy prospectuses rather than on educational activities, but at the same time they realized that the new competitive environment was not going to go away and therefore schools needed to survive making it necessary to adopt a marketing ethos. Another dilemma was concerned with the target markets of the schools; whether to market the school to advantaged students, or to all kinds of families, including for example those from ethnic minorities and pupils with special education needs. A New Zealand principal explicitly expressed this dilemma by asking: "do we compromise our basic principles for the sake of marketing ourselves or do we say well, we are educationalists and we are going to do what is best for our total clientele and if some people suffer and want to go elsewhere, well, though?" (Lauder & Hughes, 1999, p. 104). A teacher from the United Kingdom articulated a similar dilemma in a slightly different way:

> … You want to be able to teach, basically, so you want the right type of pupils here, so you need a bit of marketing, but you are also denying some other pupils the chance to be here and have a good education because you want the right type of pupils. So it's very difficult to balance the two. (Oplatka et al., 2002, p. 186)

To sum up, many principals and teachers, mainly from secondary schools in large urban cities, were found to attach great significance to marketing in their efforts to survive the new competitive environment inflicted upon schools by governments in many western countries. However, as this new policy imperative is incompatible with their educational and moral values, principals and teachers reported major dilemmas they recently had to deal with in their work. Coupled with their narrow definitions of marketing, the principals' contradictory perceptions of marketing, we believe, have some implications for their engagement in marketing planning and research, the issues we discuss in the next section.

The Limited Nature of the Marketing Plan in Schools

The marketing plan is commonly conceived of as the core of the marketing process. It includes the formulation of marketing aims and the positioning of the organization, i.e., a strategy for a product or service to occupy a clear, distinctive and desirable place relative to competing products in the mind of target consumers (Kotler & Armstrong, 1999), based in theory on marketing research and segmentation of the target market.

A recurrent question in the empirical research on school marketing referred to the extent to which a strategic planning is taking place in the marketing of schools. Researchers asked whether principals scan their market for information about consumer preferences and translate it into marketing plans, whether they segment their market, and how they position their school in relation to their competitors (e.g., Birch, 1998; James & Phillips, 1995; Oplatka, 2002a).

Based on our review of previous studies (e.g., Bell, 1999; Birch, 1998; Furse, 1989; James & Phillips, 1995; Oplatka, 2002a), and consistent with Foskett's (2002) conclusion, it is unlikely that most schools have adopted systematic and coherent marketing plan. Bell (1999) indicated that none of the principals in her study had a clearly formulated and written marketing policy or a marketing plan, and Birch (1998) pointed to the absence of a formal marketing budget, although money was allocated for certain marketing activities. In contrast, half of the internal schools in Bunnell's (2005) study had a marketing plan but only few had a cyclical one with stage. This is not to say, nevertheless, that principals and management team are not aware of marketing aims or fail to engage in planning their marketing activities. Oplatka (2002a, p. 226) cited an Israeli principal who stated that "the so-called plan wasn't a systematic, constructed plan (but rather) we had several points, where the focus is, where we should direct our marketing efforts, how to publish the school." A similar picture is reflected as regard to marketing research.

Do Schools Conduct Marketing Research? Marketing theory stresses the importance of the systematic design, collection, analysis, and reporting of data on the needs and demand of target markets as key contributions to the decision-making process of the organization (Davis & Ellison, 1997). In line with our conclusion about the lack of formal marketing planning in schools, research on school marketing revealed scant cases of using systematic marketing research in schools. In the United Kingdom Woods (1994) identified one school that carried out a SWOT analysis aimed at establishing the reasoning behind parental choice of secondary schools and at identifying the school's strengths and weaknesses in comparison with its competitors. Bagley and colleagues (1996) described one school that monitored the views of parents who had chosen the school by asking them to complete a form indicating the reasons for their choice. In Kentucky, USA, DeZarn (1998) reported that one school principal had distributed a parental survey seeking input regarding technology plans as part of the school marketing plan. There is no evidence in published research, however, to indicate that this kind of marketing research is widespread among schools.

Evidence from the United Kingdom, United States, and Israel suggest that most school management teams are unlikely to base their marketing decisions on reliable and systematic marketing research findings or on formal consumer scanning such as the results of questionnaires on parental attitudes (James & Phillips, 1995; Oplatka, 2002a). For example, none of the schools in a sample of 226 secondary schools in the United Kingdom operated a formal system of environmental scanning (Holmes, McElwee, & Thomas, 1995). In another study the assistant principal admitted that the reason for not conducting systematic marketing research was lack of time (Bagley et al., 1996).

However, the lack of systematic marketing research does not mean that principals do not obtain information from parents and stakeholders. It is evident that a substantial amount of information and feedback is gained in ad hoc ways by school staff through chance conversations with parents, meetings with parent associations, and principals' impressions of what parents want (Bagley et al., 1996; Oplatka, 2002a; Woods, 1993). Goldring and Rallis (1993) showed that contact with parents is part of the American principals' information gathering role and interactions with parents provide him/her with crucial information about their needs and attitudes toward the school. One Israeli principal owned up to having no formal instruments for identifying parents' attitudes and that informal conversations with teachers and parent's evenings were a major source for acquiring information about parents' needs and desires (Oplatka, 2002a). English principals in Holmes et al.'s (1995) study relied heavily on local authorities and trade unions to keep them informed of changes in the community.

Is there any Segmentation of the Target Market? The answer to this question is not entirely clear. Indeed, schools are unlikely to employ systematic market segmentation that refers to a division of a target market into diverse groups of buyers, on the basis of needs or behaviors, which might require separate services or marketing efforts (James & Phillips, 1995; Maguire et al., 2001; Oplatka, 2002a). But, studies revealed that principals are well aware of the need to segment the target market and tend to decide on which group of students/parents their marketing effort should focus. Ball (1994), for instance, tells us about a female principal who was looking for new markets in which actively to market her school, and Maguire and colleagues (2001) describe differentiated strategies used by the head of a sixth form for different constituencies. Both English and Israeli principals were found to focus their marketing efforts on advantaged prospective pupils (Bagley et al., 1996; Oplatka, 2002a).

An Element in Marketing Plan – Positioning the School. In theory, organizations are assumed to position their distinctive place in the market, that is, to arrange for a product to occupy a clear, distinctive and desirable place relative to competing products in the minds of target markets (Foskett, 2002; Kotler & Armstrong, 1999). In reality, schools employ some kinds of positioning strategies, although as was found in relation to marketing research, segmentation, and marketing planning, they tend to be unsystematic in nature. In that sense, schools were inclined to be highly concerned with monitoring the actions of competing schools and with their own marketing communications (Bagley et al., 1996; Herbert, 2000). Likewise, several studies revealed that school management teams do engage in building a distinctive identity and image of their school, as part of their attempts to gain a competitive advantage in the market (e.g., Ball, 1994; Bell, 1999; Herbert, 2000; Maguire et al., 2001; Oplatka, 2002a). In the United States, DeZarn (1998) reports that St. Raphael school highlights its technology applications in marketing itself, and in the United Kingdom schools were most likely to position themselves as highly academic (Bagley et al., 1996).

In sum, devising a marketing plan, including conducting marketing research, positioning and segmentation of the market using a systematic, theory-based approach, is unlikely to take place in the majority of schools acting in competitive environments. Schools were found to employ simple, unreliable techniques of marketing research and segmentation, and to refrain from establishing coherent, organized marketing plans, although marketing aims are familiar to management teams in schools.

Promotion: A Core Element in Marketing the School

Several major questions were raised in the study of school marketing in practice; what are the features of school marketing in practice? To what extent do principals manage their school in accordance with market ideology? Who is involved in the marketing of a school? How marketing activities and outcomes are evaluated, if any, in schools?

In general, the research addressing issues of marketing in practice in schools is replete with many examples of what is called "promotion" in the marketing literature, that is, activities such as advertising, public relations, and written materials (e.g., Kotler & Armstrong, 1999), which inform the market and persuade the clients to choose the service that is offered. Promotion tactics were found to be the most significant factors influencing school image in Taiwan (Li & Hung, 2009). Conversely, clients' needs-based product development, improvement of the accessibility and availability of the school, and the evaluation of marketing process, all of which are suggested in the marketing literature, were found to a lesser extent in schools. Note, the financial resources available to schools play a key role in institutional marketing to students, as Mazzarol and Soutar (2008) observed as regard to schools directed to attract international students.

Staff-Based Rather than Client-Based Educational Service Development. A main element underlying the marketing lore is "market orientation," which, by and large, refers to a priority given to consumers' needs in designing the company's product or service (Kohli & Jaworski, 1990). In education, nonetheless, any adoption of "market orientation" into the school culture is impeded in most countries by governmental legislation such as a unified national curriculum, ethical constraints, or directives from the Ministry of Education. Woods (1993), for example, indicated that senior managers in schools argued that the school curriculum was not affected by concern with competition and parental needs.

With the exception of few cases (to be considered in the next paragraph), there is little evidence to suggest that principals or other school members tend to develop the educational service in terms of the benefits and needs of the clients (e.g., parents, pupils). In that sense, James and Phillips (1995) revealed no evidence that the culture of English schools had changed and taken on a market-oriented approach. In contrast, it was commonly found that the educational service in schools was designed in accordance with what the staff *assumed* that parents and pupils want and need, rather than with their actual needs and desires. Herbert (2000) pointed out that some Welsh principals promoted niche activities such as special language units assuming that parents would be in favor of these programs, and Bell (1999, p. 65) cited an English principal who emphatically said that "this school is popular for its extra curricular clubs and its emphasis on music and performing arts."

There are, however, few cases worldwide which exemplify initial incorporation of marketing culture and orientation into schools, perhaps due to increasing pressures to positively respond to parents' needs in competitive educational arenas (otherwise they may lose prospective students). In the United Kingdom, Ball (1994) cited a principal who owned up to considering what parents think about educational programs and their extent of support, while Woods (1993) reported that one school implemented a change to its policy on formal internal exams in response to parents' expectations. In Arizona, USA, Hess, Maranto, and Milliman (2001) found some evidence that districts attempted to assuage parents' preferences by adding new services and programs. In New Zealand, Lauder and Hughes (1999) indicated that in one school the introduction of new discipline system was directed to curtail fears of violence voiced by parents.

Improving Appearance, not Accessibility. Whereas accessibility to the service is a precondition for potential buyers to consume, principals and staff are unlikely to make their schools more accessible and available to parents and pupils. But, this is not to say that issues of physical appearance were marginalized in schools. As part of their marketing efforts, Israeli principals decorated the school building and yard (Oplatka, 2002a), and school managements from England improved the facilities and made the reception area more welcoming (Bell, 1999; James & Phillips, 1995). In some English schools children's work was presented in the reception area and was changed regularly (Furse, 1989). Similar findings were found in Pakistan (Nawaz-Khan & Qureshi, 2010).

The Widespread Marketing Mechanisms – Public Relations and Brochures. As we noted above, most of the marketing activities held in schools are categorized as promotion (e.g., public relations, advertising), although they are loosely connected to larger coherent and successive marketing strategies and plans. Most schools engage in press and non-press public relations (PR), but without a documented PR policy and strategy. Principals of undersubscribed schools were found to establish relationships with their feeder elementary schools for the sake of marketing their schools.

Common forms of non-press PR were documented in schools worldwide, the prevalent of which are open days and evenings, parent assemblies, fund raising events, and lectures by the secondary school principals in "feeder" elementary schools (Birch, 1998; DeZarn, 1998; Herbert, 2000; Symes, 1998). In some cases principals did not perceive these activities as part of marketing, as Birch (1998) indicated, while in other cases principals and teachers explicitly construct a connection between their school marketing efforts and these events. Maguire et al. (2001) cited an English head of sixth form who claimed that the aim of an open evening for internal parents and students was to target this group for the sixth form. Symes (1998) notes that educational "exhibitionism" that occur on an annual basis in Australia is part of schools' impression management, and Oplatka (2002a, p. 90) quoted a principal who said that her "aim (in the open evening) is to describe what is going on inside the school, in order to let parents choose to use reliable information instead of gossip."

An attempt to evaluate the subjective perceptions of Canadian teachers and parents toward open evenings was reported by Oplatka (2007). Most of the teachers indicated that the open evening had a strong influence on the parental choice (provided that other factors such as proximity to home and image are equal) on the ground that school staff devoted much effort to introducing the school and the department. Although some of them feel that the open evening cannot genuinely transmit the teaching-learning situation, yet as teachers who work in a market-oriented system they assume promotional activities have some impact on parents and children. When analyzing the parents' and children's perspectives toward the open evening, the picture seems to be even more complex, if not to say inchoate. Although the marked significance attached to the open house in the school choice process by parents and children in this study stems chiefly from it being a source of information, a view that is shared by many parents worldwide, many of them considered it not to be of high impact on their school choice decision.

Considerable time and effort is exerted in schools on PR, mainly in respect to media exposure or publicity rather than paid advertising. It is largely evident that schools in many countries which adopted educational market policies expended much effort to gain enhanced press coverage of their activities in order to promote their image and recruit prospective students. Some English principals in Bell's (1999) study argued that they made use of the press to celebrate the work of their schools and to position the school within its local community. Furse (1989) indicated that a certain school took advantage of any opportunity to develop a close relationship with the local media in order to publicize its good work. In the United States, Goldring and Rallis (1993) noted that principals of dynamic schools choose to spend time and energy on PR as an environmental management strategy. They recognized the power of good PR which could shape parental judgments of local schools, and could help to maintain positive visibility and can reduce the unfavorable effects of negative events. DeZarn (1998) reported that local media was viewed as a means to convey technological innovation in a school in Kentucky. Similar findings were reported by Symes (1998), about Australian schools.

Although the publicity elements of PR are preferable in schools, paid advertising in local media is less common and used. The research reveals scant reference to advertisements paid by schools worldwide (e.g., Bell, 1999; James & Phillips, 1995; Oplatka, 2002a; Symes, 1998). English and Israeli principals were quoted to feel negative emotions toward advertising which was considered to be incompatible with ethical and professional codes (James & Phillips, 1995; Oplatka, 2002a).

An element of advertising that does prevail in schools, however, is the brochure. The data on this written marketing communications in schools were gathered either by researchers who explored school marketing in general (e.g., Bell, 1999) or by researchers whose main purpose was to analyze the brochures themselves (e.g. Copeland, 1994; Nawaz-Khan & Qureshi, 2010). Most pointed to the central role of brochures in school marketing, how much of schools' expenditure on marketing was allocated to their production, and to principals' beliefs in their effectiveness for marketing the school. They have strong effects on student's enrollment in Pakistan. Unsurprisingly, the brochures were described as glossy, attractive, and friendly to the readers. Ball (1994) cited an English female principal who said, "we're having a glossy prospectus next year (and) we are actually no longer having a home grown prospectus." Hesketh and Knight (1998) noted that the 52 brochures analyzed in their study varied in their use of visual materials, and 11 of them used full color printing. They argue that since 1991 prospectus packs have become more professionally produced.

In addition, the content and messages of the brochures were also analyzed (in brochure-focused studies only). With minor dissimilarities among schools within and across nations, they usually include the name of the principal and his/her message, the history of the school, its location and accessibility, school calendars, information about school admission policies, the curriculum, teaching methods, aggregate results of final exams, social life in school, discipline policy, and school facilities (Copeland, 1994; Hesketh & Knight, 1998; Oplatka, 2002b; Symes, 1998). The general aim is to present the competitive advantage of the school in comparison to other schools in a specific competitive arena.

In recent years, school websites takes a greater place in school marketing and present a kind of virtual brochures to better communicate with their market target. Smith (2007) argued that these websites do no portray the diverse range of schools that might be expected in an environment where schools perceive themselves to be competing for students' enrollments. Rather, the school images that are communicated are very similar and of particular type, a situation found also when brochures are analyzed.

In parallel to forms of PR, a marketing mechanism used by schools operating in competitive environments is the developing liaison of secondary schools in their feeder elementary schools. Some evidence from England, Wales, and Israel suggest that an emphasis on active contacts with elementary schools is prominent among the promotional activities of secondary schools. Although principals deny that promotion is the prime reason for these emergent links, Woods et al. (1996) provided examples of cooperation between secondary and elementary schools in which the former give the latter an opportunity to use their facilities as an integral part of attracting prospective pupils. In a study of secondary school management teams in Wales, Herbert (2000) identified the key priority of gaining and retaining the allegiance and support of elementary school principals. An Israeli principal explicitly set out the purpose of these links by stating "the principals and staff of the elementary schools (had) high impact upon the decisions of the prospective pupils … and I find it very important to let them know what is going on in our school, so that they will recommend us" (Oplatka, 2002a, p. 228).

Who Is Involved in Marketing Activities? One of the issues discussed in research on school marketing is the extent to which principals and staff are responsible for the marketing of the school. Notably, the management of the school marketing is accomplished mainly by the principals and by some role incumbents in the school. In James and Phillips' (1995) study, in none of the schools studied did anyone other than the principal have explicit responsibility for marketing. School marketing is virtually recognized as a characteristic of school management (Foskett, 1998), both by principals themselves whose Israeli counterparts perceived themselves as the leaders of marketing function in the school (Oplatka, 2002a), and by teachers from the south of England who perceived it to be under the auspices of management (Oplatka et al., 2002). Interestingly, PR practitioners are employed in a growing body of international schools worldwide and experience high levels of role stress (Bunnell, 2006).

This is not to say, however, that teachers were not expected by school principals to engage in marketing their school. Both English and Israeli principals in two separate studies emphasized the importance of involving the staff in marketing activities (James & Phillips, 1995; Oplatka, 2002a). Maguire and colleagues (2001) indicated that the principal of a secondary school believed that subject teachers had a part to play in recruitment to the sixth form. Indeed, it is evident that in undersubscribed schools or in highly competitive areas, the staff is likely to be actively involved in "selling" the educational programs in the open days/evening and in participating in departmental activities where pupils display their assignments to prospective parents and stakeholders (Birch, 1998; Oplatka, 2002a; Oplatka et al., 2002; Woods et al., 1996). Maguire and colleagues (2001) claim that teachers had to talk with potential A level students as part of marketing the sixth form of their school. Thus, when it comes to their subject area, teachers usually market their departments and in turn, contribute to the marketing of the whole school. The pressures on them to do so seem to be stronger in undersubscribed schools.

Any Evaluation of Marketing Effectiveness? In general, schools are unlikely to evaluate the impact of their marketing mechanisms and processes against outcomes, that is, recruitment of prospective students, as suggested by Birch (1998) and Foskett (1998). For example, most principals in James and Phillips' (1995) study considered that their marketing was effective, although none of them carried out any systematic evaluation of it. Along the same lines, DeZarn (1998) who conducted an American case study of marketing a new technology plan concluded that marketing had realized significant gains in enrollment and funding based only on a comparison between the premarketing period and afterward.

The preceding sections discussed at length the knowledge base created as a result of past and current research on school marketing, including attitudes and perception toward educational marketing, marketing plan and strategies, and school marketing in practice. The discussion which follows analyzes the limitations of research to date and suggests new directions for research on marketing in schools.

Future Directions

This article has documented the common themes and characteristics that emerged from the research on school marketing during the 1990s and the dawn of the 21st century. The research to date has been concerned with documenting marketing strategies and activities and reporting on principals' and staff's attitudes toward it. But this is highly restricted to several areas.

First, the scope and extent of research currently available, whose first purpose was to examine the processes and practice of marketing in schools, is extremely limited in its quantity, methodology, location, aims, and topics. It focused by and large on principals and teachers in the United Kingdom, and usually employed qualitative methods to document processes of and perceptions toward marketing in schools. In addition, part of the knowledge about school marketing was collected in studies whose first aim was not to examine marketing-related phenomena in schools, but rather schools' functioning subsequent to the introduction of market ideas in education.

Second, as usually happens to fields of study in their incipient stages, the boundaries of this research are neither clear nor identified. Furthermore, with the lack of coherent theories and models of marketing the school, much of the studies whose aim was to examine directly marketing activities in schools appear to be guided by business-originated marketing models which make no allowance for the context of schools and schooling. Given this trend, it is hardly surprising that studies pointed to the lack of coherent, systematic marketing process in schools, and to the overemphasis of schools on PR and on educators' perceptions of marketing. This approach to research fails to provide sufficient guidance for examining school marketing.

Third, the review reveals the limitations of current knowledge about the factors affecting marketing perceptions and engagement in schools. Although we know a little about contextual features and incentives to market the school (e.g., urban vs. rural, over- vs. sub-subscribed schools, private vs. public), most of this knowledge has not been attained through systematic, large-scale studies whose aim is to examine potential correlations between external/internal variables and the manner by which the school is marketed. This is to say that our knowledge concerning contextual influences on school marketing is somewhat speculative and based on qualitative insights from small-scale studies, rather than systematic analysis of data from large-scale studies or analysis of secondary data.

We believe that these, and other shortcomings of the current research on school marketing, are "natural" characteristics of any field of study in its initial stages of development. It is evident, for instance, that since we wrote these lines (in 2004) more researchers have begun to evaluate the direct and indirect influences of school marketing and its elements on students' enrollment, school image, parents' perceptions of the school's quality, and even teacher commitment and the principal's leadership style. To this end, recent studies have used more quantitative methodologies that enable to examine correlative and cause–effects relations.

Yet, any attempt to move the field a stage forward needs to include focus on discussions about its boundaries, legitimacy, and possible future topics. Thus, we would like to discuss here the justifications for conducting a distinctive study of school marketing and its theoretical directions, and to suggest topics for further research.

To begin with, a major concern is the necessity and legitimacy of research on school marketing. One may cast doubt on the need to examine phenomena and processes that are limited in scope and depth (as may be implied from current review). This possible view is contrasted by our belief that the limited scope of marketing observed in research stems primarily from business-originated concepts and models wrongly applied in studies on school marketing. After all, marketing science is the behavioral science that seeks to explain transactions, that is, exchange relationships (Hunt, 2002), and to "… provide the context for examination of the relationships of schools and colleges with their consumers, including parents, the wider community … " (Coleman, 1995, p. 361). External relationships and transactions should not necessarily be explored using concepts developed for product or retail marketing where "price is a very important element in the marketing mix" and represents "an essential ingredient" for assessing "customer value and benefits" (Gilbert, 2003, p. 172).

Coupled with the assumption that schools, as other service organizations, are likely to engage in marketing-like forms in order to recruit students, it follows that the choice is not whether to study the marketing of schools, but whether to do it well or poorly. The study of school marketing is needed as part of developing, testing, and disseminating knowledge about schools' external relations and internal functioning. However, one may ask whether school marketing is a distinctive area of study that may gain acceptance to grow and thrive as a distinctive discipline alongside business and services marketing. The answer to the question of legitimacy depends largely on the acceptance of models and perspectives that emphasize the distinctive features of the school as an organization in relation to other service organizations. We assume that traditional strategies developed for physical goods or for service organizations are inappropriate for schools and that school marketing, as a new area of study in educational administration, requires the development of new concepts and models that combine both knowledge from services marketing and from public sector administration.

Another concern already indicated above is what kinds of phenomena and issues should be included in the scope of marketing. As this question is controversial also in general marketing literature (Hunt, 2002), we suggest that any discussion on this issue should concentrate on whether school marketing is a normative-consultive or empirical one. In other words, should school marketing focus on developing mechanisms and techniques for marketing the school, or rather on examining marketing phenomena in schools for the sake of developing knowledge and theories in educational administration. Consistent with the discussion on the necessity and legitimacy of the research on school marketing, we believe both spheres of knowledge should be referred to. The research on school marketing, then, needs, on one hand, to describe, explain, predict, and understand marketing activities and phenomena that actually exist, just as any other social science has to do. On the other hand, similar to educational administration the field's responsibility is to develop knowledge that has the potential to be applied by school principals in order to improve the marketing of their schools. For example, there are examples of the power of good marketing in the retail sector. "Marks and Spencer had always believed in their way of doing things above all else. The lack of advertising and marketing, and a long time resistance to out-of-town developments, all marked the company out as different. This created a cycle of misunderstanding in the marketplace in the United Kingdom, which reinforced a decline once crisis hit in 1992" (Burt, 2002, p. 4). However, Marks and Spencer's rapid turnaround is accredited to its renewed interest in customers and greater focus on marketing (Lewis, 2002).

Although some "normative"-oriented marketing books were written in the educational literature (Davis and Ellison, 1997; Gray, 1991; Holcomb, 1993; Pardey, 1991), they were not based on the distinctive knowledge gained through the research on school marketing, but rather borrowed models and techniques developed in the noneducation sectors. We believe that a literature that prescribes how schools ought to be marketed and what the challenges are should be based on the emergent research on school marketing, rather than on models taken directly from business and services marketing.

The last point refers to the future of the research: what will the literature of the future be like? What should the next stage of the evolution include? Based on this review and on developments in service marketing, we will attempt to look ahead and suggest central focuses that school marketing ought to have. There is a greater need for research exploring issues of marketing that are more suitable for service organizations in general and schools in particular. As such research has begun, although scantly (e.g., relationship marketing, internal marketing). A more systematic attempt to study these and other issues would help us understand how school manage their external relations in competitive arenas and what factors lead principals to adopt certain forms of marketing and not others.

Relationship Marketing

Authors from service marketing (e.g., Berry, 1983; Brown, Fisk, & Bitner, 1994) pointed to the critical components of service encounters. They proposed that attracting, maintaining, and enhancing customer relationships are important determinants of the customer's overall satisfaction with a service. Relationship marketing (RM) puts emphasis on nurturing relationships, especially with existing customers, and the development of supportive market networks.

Although forms of RM have already been observed in schools (e.g., Bell, 1999; Oplatka et al., 2002), and in relation to school image and educational quality (Tai, Wang, & Huang, 2007), a much more in-depth research of RM is needed in order to understand this approach to marketing in the context of schooling. Subsequent research should begin to enquire into the encounters of parents and children with staff, the issue of loyalty to the school, the specific breakthrough strategies for retaining children, the nature of the exchange process in RM, classifications of marketing relationships, strategies of RM, how school establish trust among parents, and antecedents of RM in schools.

Internal Marketing

This form of marketing suggests that marketing tools and concepts (e.g., segmentation, marketing research) can be used internally with employees (Berry, 1983), because satisfied employees usually lead to satisfied customers (Brown et al., 1994). Whereas this form was documented within schools (e.g., Maguire et al., 2001), additional work ought to study the origins, nature, scope, and application of the internal marketing concept in schools, and to consider how the internal marketing concept may be developed to explain schools' attempts to recruit students through forms of RM. Further research should also explore the determinants of internal marketing such as the management style of the principal, schools' position in the market, and so forth – although such research is traditionally not viewed as "marketing." We are glad that since we wrote this suggestion, internal marketing has gained the attention of several researchers. Thus, Ting (2011) found that the influence of internal marketing on organizational commitment is not entirely a direct relationship like a simple relationship of input/output or stimulation/reaction; it is also mediated by teachers' job involvement and job satisfaction. Stachowski (2008) concluded that internal marketing takes educationally based concepts (e.g., empowerment, collaborative management, motivation) and matches them with a marketing approach of seeing staff as clients whose educational experience also needs attending to in order to achieve a high-quality educational service to paying students.

Schooling Quality

The topic of service quality has long been a major topic for service marketing (Brown et al., 1994). This includes managing quality given the heterogeneity of the service experience, designing and controlling intangible processes in postmodern community (Farrell, 2001). However, as schools typically cannot meet 100 percent of parents' expectations, further research is needed to explore topics such as consumer complaints behavior, schools' responses to these behaviors, and teacher–parent complaint interactions and resolution.

School Marketing Ethics

While many educators and stakeholders grudgingly express negative feelings toward the marketing activity, clearly much research is needed to examine the notions of ethical perceptions, personal and moral philosophies, ethical values, and social responsibilities of school members and marketers involved in marketing the school. Because education is a moral activity, research exploring these topics will increase understanding of the dilemmas principals and teachers face in competitive arenas, the ways they construct an ethical-oriented marketing, and so forth. Furthermore, commentaries should pose ethical questions such as: Are schools permitted to market themselves through slandering other schools? Can schools advertise themselves using less restrained or traditional images? Are there other forms of advertising appeal that would be effective? We believe these and other related issues should be explored and discussed in the school marketing literature.

Informal Marketing Channels: Word-of-mouth (WOM) and Rumors

An important influence on consumers' choice of products is the WOM spread by other consumers (Kamins, Folkes, & Perner, 1997), an element indicated also by school principals (Bell, 1999; Oplatka, 2002a). Consumers often use WOM to express dissatisfaction; hence, schools ought to be particularly concerned about negative WOM. Several questions for future study merit highlighting; what is the nature of WOM as it relates to the education marketplace? What situational circumstances and motivations stimulate WOM? What is the content of WOM in education? What are the implications for school marketers?

In addition, when the service is unclear, ambiguous and complex as the schooling is, rumors are very common as a means to deliver information about the school activities and functioning. Therefore, further research needs to pose questions such as: how rumors are created about schools, what are the ways parents transfer rumors, what is the school's response to rumors? Who are perceived as a reliable source of WOM?

In closing, we hope that when such and other suggested areas of research will be completed, the research on school marketing will be more established and institutionalized within the discipline of educational administration. Then, a coherent, conceptual framework summarizing the unique characteristics of schools and their impact on marketing, it is assumed, will be developed. This framework should include consumer behavior, and connect the literature on marketing (on the supply side) with that of parents as consumer (on the demand side), which, according to Hunt (2002), has long been a subfield in the discipline of business and services marketing.

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APPENDIX

Author(s)	Purpose(s)	Design	Subjects	Sample Size	Instrument	Country(ies)
Bagley et al. (1996)	Do school changes represent what parents are actually looking for in a school?	Qualitative case study	Three 11-16 schools (comprehensive)	Teaching staff principal	Interviews	England (UK)
Ball (1994)		Qualitative	Three principals	Three principals	Open interviews	England (UK)
Bell (1999)	Understanding the ways in which headteachers have responded to the educational marketplace	Quantitative and qualitative research	Primary principals	108 LEAs schools, 29 grand maintained	Lengthy questionnaire interviews	Central England (UK)
Birch (1998)	How a selection of schools have responded to the marketing challenge	Quantitative and qualitative research	Principals, governors, parents, teachers, LEA officials	25 State-funded primary schools	Formal interviews, questionnaires	England, North Staffordshire (UK)
Bunnell (2005)	To investigate long-range marketing plans in schools	Quantitative	32 International schools	Public relations practitioner	Survey	22 Countries
Bunnell (2006)	To examine the diverse role and work of public relations practitioners in international schools	Quantitative and qualitative research	34 International schools	Principals, staff	Postal surveys, school visits, interviews	England, USA
Copeland (1994)	How schools chose to present themselves	Quantitative and qualitative	Brochures	208 Brochures from all levels of education	Content analysis	England (UK)

APPENDIX (*Continued*)

Author(s)	Purpose(s)	Design	Subjects	Sample Size	Instrument	Country(ies)
DeZarn (1998)	To describe the technology plan as part of school marketing	Report	–	–	–	Kentucky (US)
Foskett (1998)	Analyzing the development of a marketing orientation in secondary schools	Qualitative case studies	Eight schools in three local education authorities	Principals, staff, governors	Semistructured interviews	England (UK)
Furse (1989)	To describe the marketing mechanism of a school	Qualitative case study	School staff	–	Observation, interviews, content analysis	England (UK)
Grace (1995)	Principals' responses to the new market-driven environment	Quantitative and qualitative research	Primary and secondary principals	21 Interviewed, 52 filled questionnaires	Survey, interviews	England, North east reign (UK)
Gewirtz et al. (1995)	The impact of school choice on schools and parents	Qualitative	LEAs officials, parents, principals, staff	Three LEAs in London	Interviews, content analysis, collection of relevant reports	London (UK)
Goldring and Rallis (1993)	Exploring the evolution of the principal's role in the context of the changing school	Evaluation, case study	11 Schools	Principals, teachers, administrators	Interviews, content analysis, questionnaires	USA
Herbert (2000)	Examining the influence of the local environment on school choice and school functioning	Quantitative and qualitative	Principals, deputies	25 Primary schools, 13 secondary schools	Statistical data analysis, semistructured interviews	Wales (UK), Swansea area

Hesketh and Knight (1998)	To consider the ways in which schools present themselves in the marketplace	Quantitative	Brochures	59 Schools	Content analysis	England (UK)
Hess et al. (2001)	Districts respond to competition from charter schools	Qualitative case study	Four small school districts in Arizona	40 District school officials and parents	Interview	Arizona (USA)
Holmes et al. (1995)	To identify the extent to which school formally engage in environmental scanning	Survey	226 Secondary and primary schools	Principals, staff	Questionnaire	England (UK)
James and Philips (1995)	Exploring and documenting marketing practice in schools	Qualitative	11 Schools in the primary and secondary phases	Senior teachers in schools, principals	Semistructured interviews, documents	England (UK)
Lauder and Hughes (1999)	Understanding how schools responded to the market	Qualitative	Three suburban schools, one inner city's school	Principals	Interviews	New Zealand
Li and Hung (2009)	Investigate how marketing tactics can enhance parents' loyalty to the school	Quantitative	60 Schools	1,200 Parents	Questionnaires	Taiwan
Maguire et al. (2001)	Examine the strategies and tactics used by secondary schools in different markets	Qualitative	One school	One head of sixth form, one principal	Interviews	England (UK)

APPENDIX (*Continued*)

Author(s)	Purpose(s)	Design	Subjects	Sample Size	Instrument	Country(ies)
Mazzarol and Soutar (2008)	To examine the countries from which Australian international schools draw such students	Quantitative	135 Secondary schools	The person with direct responsibility to recruit students	Questionnaires	Australia
Nawaz-Khan and Qureshi (2010)	Explore the variables that have a strong impact on students' enrollment in private schools	Qualitative	16 Private schools	Principals, administrators	Semistructured interviews	Pakistan
Oplatka (2002a)	Documenting marketing activities in schools	Qualitative	10 High schools	10 Principals marketing texts	Interviews, content analysis	Tel Aviv, Israel
Oplatka (2002b)	Education diversity as it is reflected in school brochures	Qualitative	13 High schools	Brochures	Qualitative content analysis	Tel Aviv, Israel
Oplatka et al. (2002)	Teachers' perceptions toward and involvement in school marketing	Qualitative	12 Secondary teachers	Teachers	Semistructured interviews	Southampton, England (UK)
Oplatka (2007)	To explore the perceived significance of promotional events in secondary schools among Canadian families and teachers	Qualitative	Secondary schools	Seven families (parents and students), six schoolteachers	Semistructured inteviews	Canada
Smith (2007)	To examine the image presented by a range of schools via their websites	–	10 State secondary schools	Websites	Content analysis	New Zealand

Stachowski (2008)	How is internal marketing being practiced within a school	Case study, mixed methods	One private language school	Teachers, heads	In-depth interview, thematic content analysis, survey	New Zealand
Tai et al. (2007)	To find the correlation between school marketing strategy and the school image	Quantitative	2,284 Respondents from vocational high schools	Faculty, students	Questionnaires	Taiwan
Ting (2011)	Clarifies the relationship between school's internal marketing and teachers' organizational commitment	Quantitative	275 Elementary school teachers	Different schools, males and females	Questionnaire survey	Taiwan
Symes (1998)	Describing various types of impression management strategies in schools	Social semiotic framework	Public and private schools	–	Semiotic analysis	Australia
Woods et al. (1996)	How secondary school respond to competition	Qualitative	76 Senior managers	11 Secondary schools	Interviews	England (UK)
Woods (1993)	Schools' responses to competition: substantive changes or promotion	Qualitative case study	Three 11–16 schools (comprehensive)	Teaching staff, parents, principal	Survey, interview, documentary analysis	England (UK)
Woods (1994)	Outlines the ways by which schools are adapting and responding to the market	Qualitative	–	Teaching staff, parents, principal	Printed media, interviews	England (UK)

SECTION ONE
THE EMERGENCE OF 'EDUCATIONAL MARKETING'

MARKETISATION AND EDUCATION MARKETING: THE EVOLUTION OF A DISCIPLINE AND A RESEARCH FIELD

Nick Foskett

ABSTRACT

This chapter provides an historical perspective on the evolution of educational marketing both as a professional field within the management and leadership of educational organisations and as a research field for academics and practitioners. It weaves together three important strands of analysis:

- *The evolution of the political, economic and social ideologies which have created the context in which marketisation of education has occurred.*
- *The development of approaches to educational marketing in schools, colleges and universities.*
- *The development of the research arena focused on marketisation and marketing in educational institutions.*

The analysis considers the challenges that market-based concepts have brought to the existing hegemonies within both education and academic

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research, and also the politics and sociology of academic research. This provides a perspective on the challenges of developing a 'new' research field as a valid and significant area of study. The chapter concludes that educational marketing has evolved very significantly over the last 30 years, but has a done so in a context of substantial intellectual and sociological challenge. Resistance to its development has at times reflected resistance to the underlying concepts of marketisation rather than a concern that its approaches and findings are not important.

INTRODUCTION

There can be few privileges for researchers and practitioners that exceed those associated with developing a new field of intellectual or professional endeavour. At the beginning of any career one hopes to make a contribution that is significant and 'makes a difference' to a professional arena. Even the most eminent of achievements, however, are usually associated with small, stepwise changes to existing knowledge or practice. Giant steps in conceptual understandings or developing significant paradigm shifts are the territory of very few. Similarly being engaged in the evolution of a new field where there is little or no prior framework of analysis or conceptualisation is a relatively rare opportunity. Over the last three decades there has emerged a small group of academics and practitioners, a community of practice, who have enjoyed this privilege of working in a new field – the emergence of marketisation and the consequent development of marketing in education. While few if any would argue that their contributions have been 'giant steps', most would believe they have been able to develop understanding and insight in an arena that was largely '*terra incognita*' prior to the mid-1980s.

This chapter will provide an historical perspective on the evolution of educational marketing both as a professional field within the management and leadership of educational organisations and as a research field for academics and practitioners. The backdrop to this analysis is the marketisation of education, the introduction of key elements of markets into the operation of public services that had hitherto been largely centrally managed command systems (see Ball, 1993; Clarke & Newman, 1992; Kenway, Bigum, & Fitzclarence, 1993). As such, this is an arena of political decision-making, of the battlegrounds of different ideologies which take fundamentally different views of the role of the state and the individual in the provision of public services. The concept of markets in education has transferred from the philosophical domain of the nature and purpose of education and the roles of individuals in society (Jonathan, 1990), to the policy domain of governments and public funding (Raffe & Spours, 2007), to the domain of leadership and management in organisations in education (Foskett, 1998a), to the educational and career pathways and choices of individuals in their families and communities (Forsey, Davies, & Walford, 2008; Foskett & Hemsley-Brown, 2001; Fuller, Heath, & Johnston, 2011). It is fundamentally about the ways people, schools, colleges, universities and governments interact in the world of education and training.

In taking a historical and international perspective the chapter will weave together three important strands of analysis. Firstly, it will consider the evolution of the political, economic and social ideologies which have created the context in which the marketisation of education has occurred. It is this ideological driver that has precipitated the development of educational policies at national levels which have obliged educational institutions to become more market-focused in their operation, and which have placed young people and their families into a position where educational choice has become an opportunity and expectation for them. In simple terms, marketisation is about the primacy of choice as a concept in social systems.

Secondly, the chapter will examine the development of approaches to educational marketing in schools, colleges and universities. Responding to policy change and changing external environments is a key characteristic of leadership and management in all organisations, and the ideological project of 'marketisation' demanded direct response from those providing institutional strategic and operational leadership. In particular, the transition from early functional approaches to marketing to later strategic approaches has been a distinctive feature of the field of education marketing, and has reflected a clear development in understanding the nature of markets and the process of marketing in educational arenas. Leaders and managers have been obliged to learn a whole new set of skills and insights, and to rethink some of the traditional views of the relationship between schools, colleges and universities on the one hand and pupils, students, parents and other stakeholders (both internal and external) on the other.

Thirdly the chapter will consider the development of the research arena focused on marketisation and marketing in education that has evolved in parallel to the evolution of the first two themes. The number of individuals who would describe themselves as academics in education marketing or markets is small, and the number of research journals in the field, which might be regarded as an indicator of profile, is also very small.

Nevertheless, the impact of marketisation, markets and marketing on almost all dimensions of educational organisation, practice and experience, means that significant numbers of academics and publications have been obliged to reflect on relevant fields. Some will have recognised that their work is about educational markets and marketing. Some will have eschewed the term, either accidentally or deliberately. Of special interest in this reflection on the evolution of the field is the context of the sociology of the academic arena. Despite the rhetoric of objectivity, the academy is not necessarily a level playing field within which new ideas or fields of engagement are always welcomed. Within academic endeavour there are hegemonies and heresies, contests and competition, allegiances and enmities that strongly influence the ways in which new ideas are able to emerge (or not). The history of education marketing as a field of intellectual endeavour has been an intriguing path through the academic jungle.

SPEAKING THE LANGUAGE – SOME QUESTIONS OF TERMINOLOGY

One of the challenging dimensions of working in the arena of education marketing is the use of terminology. This reflects the fact that much of the terminology has a long history of common usage, which has brought with it both diversity of meaning and also value-laden associations and implications, which together create some challenges. Some exposure of these challenges and exploration of the meanings is therefore helpful.

As we have seen above, the rise of education marketing as a field has arisen from the process of marketisation. Marketisation of education has many facets in detail, but is essentially the introduction of some elements of choice for those using educational services (usually students and parents), and then allowing resources (usually finance) to follow those choices. In this way the evolution of the education landscape will reflect those choices, popular providers will thrive at the expense of unpopular providers and competition will drive down costs and therefore the burden of the education system on the public (government) expenditure. The nature and operation of such 'markets' though is infinitely variable, with any aspect of either the supply or demand side subject to government determination to reflect its ideological, political or fiscal priorities. Hence, marketisation is different in every national context, and no educational market will look much like the classical theoretical markets of an economics textbook (Kirp, 2003).

The ideas of markets and marketisation in education have generated significant academic debate (e.g. Gewirtz, Ball, & Bowe, 1995; Gorard, 2000). Some of this has been focused around technical debates about the nature of education markets, and whether they are 'real' markets or not – the emergence of the phrase 'quasi-markets' in the late 1980s (Le Grand, 1990) helped quell a rather unhelpful debate. Some has focused on the demand side of education markets by exploring the nature of the relationship between students, parents and educational institutions (e.g. Reay, 1998). Negative connotations of ideas around consumers and consumerism have led to debates around the use of terms like 'customer' or 'client', and an ethically based appeal to the idea that students and educational institutions are in fact 'co-producers' of education rather than having a classical 'seller–purchaser' relationship. The academic arguments have developed perhaps rather more subtle interpretations of some of these phrases over the last two decades, but there are inevitably strongly held ideological perspectives on the marketisation of education. The use of terms like 'markets' or 'choice' or 'customer' frequently generates strong negative or positive perspectives, and these are not infrequently ascribed by association to those working as researchers in educational markets. Although an academic interest in the operation of education markets does not (and indeed probably should not), of course, require a specific 'pro-market' view from researchers, they are nevertheless frequently assumed to hold such a view – and with it may come the moral challenge from those who do not support marketisation as an approach (Foskett, 2000).

Two specific terms cause particular problems. Firstly, 'marketing' is both a verb and a noun. Marketing as a noun is the process of engaging an organisation with its external stakeholders and environment, and is essentially an analytical, strategic and intellectual process. Marketing as a verb describes the operational process of activities that engage the market, and includes advertising, selling and market research etc. Marketing as a verb is well known in the public domain, and the interaction of individuals with processes such as advertising and sales have associated the term with ideas of undue influence, doubtful veracity and moral questionability. Marketing as a noun is less understood. Hence, use of phrases such as 'education marketing' or 'educational marketing' is typically first interpreted as meaning those actions of dubious integrity but applied in an educational context. Indeed, in the early stages of marketisation this was not untypically the interpretation used by leaders and managers in educational institutions, and resulted in the uncritical adoption of sales and promotional techniques from the arena of consumer goods selling. The recognition that marketing is actually a strategic and analytic approach came rather later to education, by which time some perceptual damage had been accrued (Lumby & Foskett, 1999).

The second challenging phrase is that of marketing research. Marketing research has two parallel meanings. Firstly, it refers to a whole set of approaches undertaken by professional marketers to investigate their operating environment. This might include researching consumer choice processes, analysing competitors and their operations, exploring different pricing strategies or seeking to tailor their product or service to what their clients or customers seek. Part of this may be what is traditionally called ‘market research’, which is essentially identifying what products or services potential customers might want. Secondly, though, it refers to a field of academic endeavour – research into the nature and operation of markets and marketing, which may be undertaken by academics or professionals in the fields of economics, social sciences, business or management, or, where the focus is the operation of markets in a specific environment such as education, educational researchers. This is of course, the domain of those whose work is the focus of this volume. While they know and understand the approaches of the first meaning of ‘marketing research’, their endeavour is in the field described by the second meaning. Their discipline is research into the nature and operation of markets in education, and this can include, inter alia, policy studies, leadership and management studies, the study of educational choice or the study of educational economics in the context of markets.

THE EMERGENCE AND DEVELOPMENT OF EDUCATION MARKETS AND MARKETING

The development of educational markets, and the consequent need for educational leaders to engage with marketing, is typically associated with the period since about 1980. It is aligned with the emergence of market-focused political ideologies, rooted in the ideas of von Hayek (1976) and put into political practice by conservative administrations in a number of countries, most notably initially in the United Kingdom and the United States. However, education markets are by no means an entirely new creation. In essence, a market exists where there are alternatives that an individual can choose between. In the school sector, therefore, the opportunity in many countries for parents to choose private education over the state sector has created a small but important market in the compulsory phase of education that has a long history (Foskett & Hemsley-Brown, 2003). Perhaps, more importantly, in the post-compulsory sectors of education and training (i.e. the education and training provided for those older than the minimum school leaving age) there has always been competition and the existence of markets. In the United Kingdom, for example Further Education Colleges (FECs) have long competed with schools to provide education and training for 16–19 year olds (Gray, 1991). In the higher education sector, universities have always competed to recruit sufficient students, and students of high academic potential. In both the college and university sectors, the market consists not just of competition between education and training institutions, but with other sectors including all forms of employment (Scott, 1996).

It is from the post-compulsory sector that some of the earliest ideas on educational marketing emerged, therefore. In the higher education sector, this occurred through two developments – the sharing of student recruitment practice, which emerged initially in North America, and the recognition that there were benefits to accrue to institutions from considering their public relations activities. In North America a number of publications and organisations associated with marketing universities and colleges emerged in the 1970s and 1980s (e.g. the *Journal of Marketing for Higher Education*), and the seminal book on marketing universities by Paul Kotler and Karen Fox was published at the end of this period (Kotler & Fox, 1995). In the United Kingdom, similar sharing of recruitment practice occurred through professional organisations such as the Higher Education Information Services Trust (Heist). Heist led the way in providing publications on public relations and marketing management in universities, and also ran training and development programmes for both operational and strategic managers in universities (e.g. Keen & Greenall, 1987).

In most universities, however, marketing was still low key at this stage (Smith, Scott, & Lynch, 1995). Almost all Higher Education Institutions (HEIs) were selecting rather than recruiting institutions, and overall demand for university places far exceeded their availability. Perhaps more importantly, the sector was dominated by a strong perspective that the nature and organisation of universities was simply a matter for the academy, who would determine the curriculum and the syllabus independent of external views. Hence, marketing was simply a matter of giving sufficient information about courses and programmes, typically through prospectuses and, in more forward thinking universities and colleges, open days. Marketing was typically the responsibility of the recruitment and admissions team.

In the further education sector a similar perspective dominated. Although, *sensu stricto*, in the United Kingdom such colleges were in a competitive marketplace, through until 1988 all were funded, and hence in effect protected from the market, by Local Education Authorities (LEAs). Marketing was seen in much the same way as by universities, with the responsibility lying with the recruitment and admissions team. The sharing of practice on operational aspects of communicating with potential students began to emerge in the 1980s, led in the United Kingdom by the professional development programmes of the FE Staff College at Blagdon. From such sharing of practice emerged a number of publications (e.g. Gray, 1991), but all focused on the operational dimensions of marketing. Practice typically borrowed techniques uncritically from marketing in the 'for profit' business sector, with a limited understanding of the distinctive nature of 'choice' and college/student relationships in education and training.

By the late 1970s and into the 1980s, therefore, education marketing was the domain of the post-compulsory sector, operating either in highly protected markets or markets where demand hugely exceeded supply, and driven by a product-focused view of education and training. The 1980s, however, saw a significant stepwise change, for it was during this decade that some of the fundamental philosophical and operational tenets of state-funded education began to be challenged by the political 'right'.

The stimulus to this change had three elements. Firstly, at the end of the 1970s, governments in a number of countries began to question the relationship between education/training and the economic priorities of the state. The root of this was the economic challenge of recession in the 1970s. The downturn of economies and the rise in unemployment was placed squarely on the shoulders of education systems that were deemed to be exercising 'producer control' to sustain outdated academic curricula, not producing school and university 'graduates' fit for economic purpose, and doing so through increasing levels of public expenditure on the system. Secondly, the 1980s saw the emergence of the recognition of the global inter-connectedness of economies and the shift of competition from regional to global scales. Although the term 'globalisation' was not coined until later (see Maringe & Foskett, 2010), governments recognised that economic well-being was now dependent on having a competitive edge in global markets. Just as important was the emerging view that the economy was becoming more knowledge-based in its nature, and that competitiveness would be dependent on having an increasingly educated and trained labour force. The roots of the expansion of universities that occurred over the next two decades in many countries were planted by this recognition (Maringe & Foskett, 2010; Weber & Duderstadt, 2008). Thirdly, the election of conservative administrations in many western countries at the same time also saw the promotion of the ideologies of choice, personal responsibility, the importance of markets, and the promotion of 'small government' through reducing the burdens of taxation and public expenditure.

We shall look at these changes through the case of the United Kingdom. Although every national context is unique, for the balance between the three forces of change differs between states, as does the precise political motivation, the United Kingdom illustrates well the interaction of the key pressures for change. Teixeira, Jongbloed, Dill, and Amaral (2004), Neubauer and Ordonez (2008) and Maringe and Foskett (2010) provide an international picture of higher education marketisation, while Thrupp (1999) and Forsey et al. (2008) provide an excellent summary of marketisation in schools around the world.

Concerns about the ability of education professionals to deliver the educated labour force required by the United Kingdom had been raised by Prime Minister James Callaghan in his speech at Ruskin College in 1976 (Callaghan, 1976). When the Labour administration was replaced by the Conservative government under Margaret Thatcher in 1979, the policy pressure for change was strong, and during the 1980s and 1990s a series of statutory and policy changes introduced marketisation to the school environment and enhanced marketisation to the college and university sectors, most notably through the 1988 Education Reform Act and the 1992 Further and Higher Education Act. For schools, the marketisation that resulted had a number of components.

- Choice was given primacy as a concept in relation to school admissions, and parents were empowered to choose primary and secondary schools for their children.
- Schools were given strong accountability for their own performance by delegating most funding to schools, with funding directly linked to pupil numbers. Quality was then measured against the obligations of a National Curriculum through regular and frequent inspection by government inspectors.
- Schools were encouraged to differentiate themselves in the market by adopting particular specialisms within or over and above the National Curriculum.
- Competition was seen as the mechanism for encouraging schools to seek excellence in what they do, and so raise standards, while at the same time

unsuccessful or unpopular schools would be unable to continue to operate.
- Competition was seen as a way of reducing per capita costs, and hence ensuring better value for the public expenditure on state education.

These principles have evolved in detail over the quarter century since they were developed. Complexities of choice systems, for example have meant that in most localities choice is more typically now seen as an expression of preference rather than an unfettered selection process. The diversity of schools has been much enhanced by the introduction of other forms of governance, including academies and trust schools. The pressure to raise standards has seen direct government intervention to close 'failing schools' before their financial position makes such a move inevitable. Nevertheless, the basic principles of a marketised school system remain essentially the same as conceived in the 1980s and have been maintained by governments of all political persuasions. Schools have therefore been faced with the challenge of understanding the nature of the markets in which they operate and developing the skills and approaches to enable them to be successful in their own context.

For post-compulsory education, marketisation has developed in different ways. In the FE sector government pursuit of marketisation ran parallel with the desire to grow the participation rate of 16–19 year olds as well as the absolute number gaining vocational and academic qualifications at Level 3 (equivalent to pre-university levels of achievement). Enhanced marketisation offered governments the additional benefit of dealing with the intractable issue of how to increase substantially the numbers in education and training without proportionally raising costs – competition, it was thought, would pressure colleges to improve both efficiency and effectiveness in their operations, and so drive down unit costs (Farnham, 1993). To increase competition further, the 1992 Further and Higher Education Act established FE colleges as independent incorporated institutions, free from local authority control, funded directly on a per capita based model by government, and hence dependent for their survival in the marketplace on their ability to identify and meet local and regional education and training needs. Autonomy, independence, competition and the task of growing student numbers substantially placed FE colleges in a very challenging market arena, where the need for marketing knowledge and skills had become significant (Foskett & Hesketh, 1997).

For universities the challenges have been similar to those faced by FE colleges, although without some of the operational constraints or extremes of competition (Brown, 2010; Maringe & Gibbs, 2009). Moreover, it has not been until some of the reforms emerging in the second decade of the 21st century that some of the real challenges of competition may be faced. Universities have increased in number over the era of marketisation from approximately 60 in 1980 to some 150 by 2010, principally by the awarding of university status to other HE institutions (e.g. polytechnics and teacher training colleges). This has provided a distinctively differentiated sector, where institutions have been in strong competition. Fortunately for most universities the last three decades have seen strong government push to increase participation rates in HE, and these have increased from some 6% of the age cohort in the early 1980s to some 43% by 2010. Alongside this, older adults have been encouraged to enter HE as mature students. In addition, the international demand for UK education from overseas students has grown very substantially indeed, so that overseas students now make up some 15% of all students in British universities. The result of all of these changes is that while competition has been strong, demand has accelerated, and UK universities still operate in an environment where demand for places exceeds supply by ca. 100,000 places per year, and demand from overseas students is growing at 5% per annum. Universities have always been independent institutions dependent for their success or failure on their own leadership, management and strategy. The changing environment has obliged them, though, to be increasingly attentive to their markets, both in the United Kingdom and overseas (Maringe & Foskett, 2010; Stachowski, 2011). The growth in international recruitment provides a distinctive dimension to HE education marketing, a development which although not as significant in terms of student numbers, has been paralleled by the activities of many FE colleges and independent (i.e. not state-maintained) schools.

EDUCATION MARKETS – THE ACADEMIC DEBATES

The changes to the operational environment of education that have been brought about by marketisation have been radical. Almost every part of the system, from the providers to the administrative structures and processes, to the relationship with pupils, students and their supporters, is now different than it was prior to marketisation (Ball, Bowe, & Gewirtz, 1996; Foskett, 2003). Such significant change, particularly with its roots in political perspectives and ideology, has generated much academic debate. The debates can be seen as relating to specific themes, which have themselves evolved and developed over the last three decades. The broad themes are:

1. The ethical and philosophical aspects of markets in education
2. The nature of 'choice' and educational decision-making
3. The operation of markets and their impact on educational systems
4. Management in the context of educational markets by institutions.

We shall briefly examine each of these research themes.

The Ethical and Philosophical Aspects of Markets in Education

The earliest academic reflections on markets in education took place during the evolution of the policy agenda that established them and then during the early years of their implementation. Two factors shaped this debate. Firstly, some observers considered the philosophical challenge of the fact that the ideas of markets, competition and choice introduced a 'wild' operating context (Carlson, 1975) to educational environments traditionally regarded as 'domesticated', that is built on notions of service, equality, professionalism with no threat to institutional long-term survival. Hence, they fundamentally challenged the status quo of education. Key themes in the debate included issues such as:

– The appropriateness of market concepts to education (e.g. Jonathan, 1990)
– The expected ethical issues around competition and potential 'winners' and 'losers' in the marketplace (e.g. Gorard, 2000; Thrupp, 1999)
– The economic and social basis of the market concept as embodied in policy developments. (e.g. Kenway et al., 1993).

The challenge of moral debate is the risk that it leads to judgements of 'right' and 'wrong' in relation to specific actions and outcomes. Changes to any operational system will produce different outputs than those that existed before – indeed, this is one of the fundamental aims of any systemic change. The adoption of market-based strategies by governments sought a number of outcomes deemed to be politically desirable by the implementing administrations. However, in a strongly values driven debate such as that about markets in education there will be those who attribute low value to the new set of outcomes, those concerned about the loss of some of the existing outcomes, and those concerned about the possible unintended negative consequences of the changes.

It is with this latter group of concerns where the second factor comes into play. In the early years of marketisation there existed only limited evidence of the impact and operation of such markets and, as a result, the debates were of necessity theoretical and philosophical rather than empirically based (e.g. Kenway et al., 1993). The debates peaked in the early years of the 1990s, and represented challenging discussion of a wide range of moral and ideological perspectives. However, consideration of the issues relating to outcomes subsequently emerged again once empirical data became available on the operation of markets, when it was possible to provide a more evidenced perspective on the philosophical positions adopted during the theoretical debates (Stachowski, 2011).

The Nature of 'Choice' and Educational Decision-Making

The second theme of research engaged with the concept of 'choice' and how it might operate in education markets. Choice, of course, has a long history of research within a range of disciplines, ranging from Economics to Psychology to Sociology and Business/Management/Marketing, with models developed that already had a strong presence in the management of marketing in the commercial arena (e.g. individual rational calculus, Veblen's model of choice relating to positional goods (Veblen, 1899) or Simon's optimiser/satisficer model (Simon, 1972)). The research challenge came in two directions – inductive research to test existing models of choice in the 'new' context of education, and deductive research seeking to derive insights by examining empirically the choice processes of young people, their families and advisors.

The earliest research sought to identify the key factors in choice and their relative order of priority (e.g. Hunter, 1991), but set the analysis in a framework that presumed objectivity and rationality in the choice process. So while lists emerged of the factors involved in choosing primary schools, or secondary schools or universities, some of the key aspects of choice were largely ignored. In particular, such models took no account of the contextual nature of choice, and the idea of choice as a socially situated process subject to the influence of a range of dynamic internal and external contexts for the individual. A recognition of the complexity of choice emerged only at the end of the 1990s and the years that followed through the emergence of analysis by authors such as Gewirtz et al. (1995), Reay (1998), Foskett and Hemsley-Brown (2001) and more recently Kelly (2007) and Fuller et al. (2011).

Interestingly, despite the emergence of more sophisticated models of choice, the impact of that understanding on the policy frameworks used by government to underpin marketisation strategies has been minimal. Based on the notion of rationality in decision-making, the policy rhetoric has been that choosers need increasing levels of consistent data to enable them to make rational comparisons between well-researched choices. Hence, school reforms of the last two decades in the United Kingdom have given primacy to the role of school performance league tables as a key way of providing comparative data to parents. Similarly, at the heart of the university funding reforms developed for implementation in 2012 in the United Kingdom lies the provision of a standard Key Information Set (KIS) for every programme at every university to enable potential students to undertake comparative shopping. While such data is not without some role, typically as confirmatory 'hygiene' evidence, it is clear that it sits at the margin of decision-making processes which are essentially emotional responses to observations about context, environment and personal 'fit'. In such circumstances, the data may actually confound choice by implying that there is an objective 'right' choice to be made or by overwhelming choosers with too much data.

Research into 'choice' has become a less significant part of the research arena on markets in education, however, over the last half decade, in response to the better understanding that emerged from the work cited above at the turn of the century. It is only where radical change is proposed (such as the UK HE reforms of 2012) that research into 'choice' will be of high priority, where it will seek to answer the question 'Is choice in the new context different than in previous contexts?'. Continuing research in choice will be important though, as managing both the operational and strategic dimensions of marketing in education requires a subtle understanding of decision-making in relevant markets.

The Operation of Markets and their Impact on Educational Systems

Marketisation has been one of the global scale metatrends of the last two decades. From an initial emergence in the United States, the United Kingdom and New Zealand (often cited as the first full national development of a market-based school system), elements of education markets are now present in the majority of the world's nations. The extent of development varies, of course. In relation to schools this variation ranges from those states where there has simply been enhanced resource delegation to schools and colleges but still limited choice (e.g. Germany), to countries where choice lies at the heart of the system (e.g. Chile). In relation to post-compulsory education, universities might now be regarded as universally operating in competitive markets, many of which are global in extent.

While the structures and systems of markets are typically put in place over short periods of time, their impact requires longer to observe. Students spend many years in education, and so the overall impact of change will also take many years to emerge. Furthermore, those charged with leading and managing in the new environments will develop insights and expertise over time to enable a more nuanced landscape of practice to emerge. Such developments have inevitably been a focus of researchers seeking to understand the nature and impact of marketisation, and over the last two decades studies have been undertaken in three contexts:

(a) Holistic system level studies, which have sought to identify and critique change across multi-dimensional elements of, for example a national secondary school system. Thrupp's analysis of the changed market conditions in New Zealand schools (1999) provides a detailed and critical review of the background to, implementation of and impact of marketisation some years after the initial implementation of change. It provides a broad perspective on a range of issues from the nature of choice, to the choice strategies of parents, to the impact on successful and unsuccessful schools and the overall effect on the levels of achievement within the school system, and Thrupp concludes that while the ideological ambitions of the development had largely been achieved, the downside consequences predicted by observers had indeed also accrued. A similar detailed analysis of developments in Argentina is provided by Rhoten (2000).
(b) Institutional level studies, which have focused at the micro-scale on how a single school/college/university, or small comparative set of institutions, have responded to marketisation. Such studies have been relatively numerous (see, e.g. Foskett, 1998a; Oplatka, Hemsley-Brown, & Foskett, 2002), and provide a richer perspective on specific impacts. A theme emerging from such studies has been the development of a market-focused culture in schools, colleges and universities, with identification of the key criteria in a marketing culture (Foskett, 1998b, 2003) and of the progress of institutions towards developing that culture.
(c) Thematic studies which have sought to address some of the broad themes of market impact – for example, a consideration of pupil achievement in schools which are popular or unpopular in their

particular markets. These are typically 'single issue' analyses, and are exemplified by Gorard's work on student achievement in schools in high and low SES (socio-economic status) locations in the context of marketisation and competition (Gorard, 2000).

The Management of Educational Institutions in Marketised Environments

One of the distinctive fields of research in education has been that of educational leadership and management. Its principle focus is the development of understanding in relation to the operation of educational institutions, and it draws strongly from the traditions of management, of organisational sociology and psychology as well as from the ideas of education, about how young people learn, develop and behave in educational settings. The enhanced marketisation of education from the 1980s onwards has significantly changed the operational context for schools, colleges and universities and has thus introduced a number of new and distinctive dimensions to research in educational leadership and management.

Firstly, there is a dimension which examines the nature of market behaviour in the management of institutions (Gewirtz et al., 1995). This extends from the emergence of market-focused aspects of strategy, such as financial accountability and market positioning, to the operational dimensions of market behaviour, including promotional activities, curriculum design as a response to market demand, the management of external relations, and the organisation of recruitment activities. This is marketing in practice, whether strategic or functional marketing.

Secondly, there is a dimension which considers how existing management and leadership challenges are changed by the emergence of marketised contexts. An example is in understanding the management of curriculum design and development in schools or universities, where the focus on choice by potential 'consumers' has obliged institutions to consider not just the academic ideals of programmes but also how that may both match student, pupil and/or parental wishes and how it might be best presented in the marketplace. A second example is the training and development of school leaders, whether as principals/head teachers or as middle managers. The challenges of operating in marketised contexts have added a range of requirements to the skill and knowledge set which effective leaders need, and hence headship training, for example, now must incorporate, *inter alia*, skills of strategic marketing and the management of external relations (e.g. Foskett, 2002).

Thirdly, there is a dimension focused on the interaction of educational institutions and their external environments (Lumby & Foskett, 1999). Schools, colleges and universities were frequently regarded as islands, characterised by an inward looking culture and with little need to interact directly with the communities and world 'beyond the school gate'. Marketisation has fundamentally challenged this view, and institutions must now manage their relationships with a wide range of external stakeholders, partners and clients. Skills of external communications, building partnerships and analysing rapidly changing environments are now at the heart of managing institutions, and understanding the nature of these elements of management and leadership is an important research focus.

Fourthly, there is a wider strategic leadership challenge in the context of delegated accountability and institutional autonomy which characterises most marketised systems, and this is an important area of research interest. Institutions now have obligations not simply to manage the internal processes of education (the business of the organisation), but more importantly to manage the survival and success of the school or college in a competitive external environment (the organisation as a business). Leaders must be what Gewirtz et al. (1995) have described as 'bilingual' in that they must understand (and speak) the language of education and learning, but also the language of business, strategy and the market.

Research into these dimensions of education markets and marketing has emerged from the early 1990s onwards, as the evidence of changing activities has been observable. Early studies in the United Kingdom included those by Foskett (1992) and Gewirtz et al. (1995) into markets in schools, while studies of the management of marketing in colleges and universities emerged a little later (e.g. Hemsley-Brown's, 1999 study of FE and Smith et al's, 1995 study of universities).

Emerging from these studies have been a number of observable trends in the management of marketing in education, and these were summarised by Gewirtz et al. (1995) and Foskett (1998a, 2002) in their overviews of marketing in education. By the end of the 1990s the key features of the management of education marketing could be identified as follows:

1. A resistance across the sector to the notion of marketing, with a strong view that it represented an alien concept compatible with the ethos of business but not compatible with the ethos of education.
2. An uncritical adoption of promotional techniques, focused entirely on raising the name recognition of institutions and adopting a 'selling' and promotional orientation to the institution's marketing position.

3. A position for marketing that set it as an 'add-on' function to the management of schools and colleges rather than being embedded in the culture and organisation of the institution.
4. The rather slow appearance of strategic approaches to marketing rather than operational approaches.
5. Operation at a functional level by staff with no background in marketing, typically at a relatively low level of seniority in the organisation.
6. A belief in a rational model of consumer decision-making, in which parents and students undertook a systematic pathway through the choice process.
7. A relatively limited permeation of a market-focused culture into the operation of the school or university.
8. An absence of formal training opportunities either for senior staff or head teachers in strategic and operational aspects of marketing.
9. The achievement of positive marketing outcomes (in terms of name recognition, applications to the school or college etc) through the adoption of strong approaches to building relationships with parents and partners even where the canons of marketing were eschewed.

By the end of the 1990s therefore, the landscape of marketing in education was largely unsystematised and disparate, with a wide range of practice and expertise, and a predominantly unwelcoming view of its role in achieving the core aims of education, that is raising achievement and aspirations amongst students.

The first decade of the 21st century was dominated in policy terms in the United Kingdom by the persistent adoption of an increasingly market-based approach to schools and colleges. Institutional autonomy was enhanced in all sectors. Schools, colleges and universities were encouraged to differentiate themselves to compete. Expansion of student numbers beyond the minimum school leaving age was premised on competition and reductions in the unit of resource. At the same time, institutions began to absorb marketing as an important part of their management tasks, and institutional leaders were increasingly expected to adopt a market-aware approach to the strategic operation of their institutions. By 2003, for example a re-examination of the adoption of marketing culture (Foskett, 2003), showed a marked shift in the engagement with marketing at a senior level by schools. Furthermore there had emerged a recognition by staff at all levels of organisations that the well-being of their institution was dependent on operating effectively in the marketplace, and that as individuals they held some direct responsibility for this function through their day to day work on curriculum, teaching and interfacing with pupils, parents and external organisations.

By the end of the first decade of the 21st century, therefore, there is a different picture of education marketing in schools, colleges and universities.

1. Position in external markets is a key element of the strategy development in most institutions. The emphasis on meeting the needs and wants of pupils, parents, students and future employers is now embedded in approaches to curriculum design, the benchmarking of outputs (e.g. examination results), the design of physical estate and facilities, and in the priority placed upon effective management of the relationships with 'external' organisations and stakeholders.
2. The growing permeation of the concept of 'brand' into the educational arena is well established. Whether referred to by name or simply implied in management operation and decisions, the recognition that identifying and sharing the distinctive features of the institution and the value added that the organisation brings through its educational provision is critical to most institutions' strategies.
3. A more sophisticated understanding of the relationship between educational institutions and their 'customers'. Indeed, the idea of 'customers' or even 'clients', is now seen as a limiting and unhelpful description of the relationship, for it is recognised that 'good' education is the outcome of interaction and partnership between school and pupil, or university and student. In effect the outcomes are generated by the intimate interaction of these two groups in what has been described as a relationship of 'co-creation'. Just as joining a gym does not in itself guarantee improvements in fitness unless the 'buyer' actively engages in the process, so choosing to attend a particular school or university doesn't guarantee the best educational outcomes without the full engagement of the pupil or student with the institution. Educational markets are about designing and delivering the most effective approaches to partnership, with responsiveness an obligation on both sides of the relationship.
4. Educational leaders and managers need to have the skills of strategising in marketised environments. The recruitment of institutional heads in all sectors now identifies such strategic and operational skills as essential parts of the role description and person specification. Performance of the leadership is now typically judged with reference to institutional outcomes that are compared with similar competitor schools, colleges or universities.

CONCLUSION

This chapter has sought to provide an overview of the emergence of markets in education, the consequent development of leadership and management in the context of marketised systems, and the contribution that research has made to understanding those developments. While seeking to chart the changing map, there are a number of overall concluding observations, which reflect key themes or issues in the emergence of the field, and three of these will be considered here.

Firstly, it is clear that market-based concepts and marketisation have created significant challenges to the hegemonies that previously existed within both education and academic research. Their introduction brought philosophical and operational challenges that provided a conceptual battleground in which the existing perspectives were challenged by new ideas and where those new ideas brought both ideological and sociological conflicts within existing 'communities'. Educational communities, for example, resisted notions of the student or parent as 'customer', while research communities resisted the idea that markets and marketisation were legitimate areas for scholarly work in education. Markets and marketisation have therefore been 'both the site and the stake' of intellectual conflict (Ball, 1993) as centralised producer-led notions of education began to be challenged by individualised, negotiated models of what education might be.

While there are many both within the professional realms of education and within the wider community who regard marketisation as an inappropriate philosophy and concept for education, there are now few who do not accept that the new relationships and paradigms demanded by marketisation are part of their professional obligations as teachers, academics, managers or leaders. The battle to protect education from the challenges of the market has largely been lost, and the leaders of our schools, colleges and universities are obliged to operate in, and be accountable to, a marketised environment.

Secondly, it is possible to observe a cycle of transition and change in the evolution of education markets. The initial development was resisted by many, but a few early adopters took the concept forward and developed practice and ways of working that both shaped the future evolution of the landscape and also set out ways of providing leadership and management in educational arenas. Over time the forces of resistance reduced, more adopters engaged with the idea of operating in markets, and the new approaches to leadership and management became embedded and normalised across the sector. At the same time, techniques and perspectives adopted from other market scenarios became adapted to fit the ideas and beliefs of the educational world. By the end of the first decade of the 21st century the dissemination of the innovation of markets in education is largely complete in many countries.

Thirdly, the politics and sociology of academic research, and of research communities, and the interplay of professional and research communities has provided a challenging backdrop to this development. Developing a 'new' research field as a valid and significant area of study such that it is accepted as a worthy field of endeavour is always difficult, and this has been especially the case when the negative philosophical perspective attached to markets by so many of the professionals in education was transferred to a concern about the motives and respectability of those undertaking research into its development. By the end of 2012, such negative connotations have largely disappeared, and the contributions to this collected volume demonstrate the range of high quality, insightful and valuable research which is being undertaken in the field. Research on leadership and management in education markets has become mainstream educational research.

Educational marketing has evolved very significantly over the last 30 years, but has a done so in a context of substantial intellectual, professional and sociological challenge. Resistance to its development has at times reflected resistance to the underlying concepts of marketisation rather than a concern that its approaches and findings are not important. More recently the maturing of marketised education systems, the placing of market views at the heart of institutional strategies, and the refining of understanding of the relationships between providers (schools, colleges and universities) has seen the leadership and management of education marketing become a core function in institutions. The task now for both professional educators and researchers is to be clear how leading schools (or colleges, or universities) in such contexts can be managed to optimise the raising of levels of achievement and aspiration by pupils and students over the coming decades.

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INTEGRATING MARKETING INTO THE LEADERSHIP AND MANAGEMENT OF SCHOOLS: A CURRICULUM-FOCUSED APPROACH

Felix Maringe

ABSTRACT

The chapter explores the growth of marketing in education with a specific focus on schools. It argues that developing a marketing orientation has become a key integral objective of schools and examines the leadership requirements needed to nurture this ambition. Central to this development is the need to focus on the curriculum, a key part of the mission of schools, as an organizing idea for successful and relevant school marketing. Based on the CORD model of educational marketing (Maringe, 2005), the chapter argues that school leaders need to develop a set of marketing competences in four specific areas: market contextualization competences; marketing organizational competences; marketing research competences; and marketing development competences.

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INTRODUCTION

Although marketing has become an increasingly important aspect of the overall organization of most educational institutions around the world, its role remains peripheral to the leadership and management of schools. The meaning, purposes, and approaches associated with the idea of marketing in schools are highly contested and continue to stir much controversy despite the general acceptance that marketing has a place in education.

Due to growing forces of marketization and more recently globalization, in the last 20 years or so, at least in the western world, schools have generally embraced relationship marketing, establishing external relations departments as the key evidence of the adoption of the marketing philosophy. However, these external relations departments have remained largely outside the core business of developing their curricula. In schools, as in other education services, the curriculum is the centerpiece, the heart and soul of the establishment; leadership and management efforts revolve around the idea of the curriculum. To integrate marketing more solidly with leadership and management roles, the focus has to shift from an external perspective to a more internally driven approach that places the curriculum at the heart of schools' decision making.

The chapter proposes to explore this argument by examining the following key issues:

- Marketing in education, meanings, drivers, purposes, and approaches
- The growth of relationship marketing as the key marketing approach in schools: opportunities and constraints (Foskett, 1992)
- Centrality of the curriculum in leadership and management decisions
- The curriculum-focused approach to marketing based on the CORD model (Maringe, 2005)
- Implications for managing the classic 4Ps in schools.

MARKETING IN EDUCATION, MEANINGS, DRIVERS, PURPOSES, AND APPROACHES

Marketing in education is a relatively recent phenomenon, rising in prominence in the late 1980s with the emergence in many western countries of the idea of the "market" as the model for economic development. The concept, as with most postmodern ideas, emerged from the world of business where profit is the underlying motive.

Many people agree that education is not a profit-motivated enterprise, but this is based on a narrow conceptualization of the notion of profit that is often taken to mean making more money than you spend. More broadly conceived, profit in education may be taken to mean a number of things far removed from financial capital, such as the value added to the experience of learners; the knowledge attitudes and skills they develop under the auspices of the school; the preparation they receive for becoming engaged and proficient members of the world of work; and the development of social capital that nurtures healthy societies and promotes sustainable futures, political stability, and democratic values.

The meanings of the idea of marketing have evolved over time. Kotler (2003) talks of the five phases or philosophies in its development. First was the product philosophy, based on the assumption that customers will always purchase the best products. To get the highest profits, all the company's efforts had to be focused on continuous product improvement. The idea enjoyed considerable support since it coincided with Edward Deming developing the notion of continuous and total quality (the TQM movement; see, for example, Chafee & Lawrence, 1992). In an educational sense, this would mean that students would seek places in an institution whose programs and teachers were perceived to be of the highest quality.

All the marketing effort was thus to be focused on ensuring program and personnel quality. However, the focus on product quality remained the preoccupation of product developers who assumed that they had a better understanding of what customers needed and wanted. The product philosophy of marketing thus provides an internally driven approach to business development. Over the years, there have been many well-documented, failed educational initiatives across the world which have been based on flawed philosophical underpinnings (see, e.g., Comer, 1997; Cuban, 2003). It is not just about the product; it is also very much about how those products help people to deal with their daily problems and challenges. In Zimbabwe, for example, following independence a new curriculum was designed that was going to be based on the principles and philosophy of scientific socialism. While this sounded attractive and in line with the political ideals of the preceding liberation struggle, those who worked with the new curriculum, that is, the students, teachers, and parents, found it somewhat alien and unworkable in an economic environment that appeared to be led by market principles (Chivore & Masango, 1990; Maravanyika, 1990).

The second phase in the development of the marketing idea was characterized by a production philosophy. Fundamentally, it was assumed that while product quality had to be good, what was of greater significance was to develop ways of increasing access to these products. In business terms, this meant improving product distribution facilities through more efficient transportation, development of the chain store concept, and developing methods through which customers could access these products without leaving their homes, such as through online purchasing. In education, the production philosophy saw an explosion in the growth of distance learning and the development of part-time and online learning. Marketing in this sense was a reaching out process in order to capture the greater slice of the educational business opportunity. However, the market for distance, part-time, and online learning tends to be restricted to rather specific segments of learners, such as adult learners, those in full-time employment, and those returning to education following varying periods of absence from full-time learning.

A third phase of marketing grew at a time when business started to become democratized and multiple players began to compete in the marketplace for the same resources and customers. Suddenly, product quality and distribution were insufficient criteria to guarantee good profit margins; businesses started to compete on price. The idea of the "hard sell" grew out of this as businesses had to emphasize the point that "we won't be beaten on price" and that "if you find a lower price elsewhere, we will match that price and in addition reduce it by a further percentage." Supermarket wars emerged, and some outlets working on the basis of offering the lowest price in the market seem in healthier financial positions than traditional outlets that base their business marketing on quality. In education, price is a relatively elusive concept. Cheap educational products tend to be shunned. People will sacrifice other expenditure quite significantly in order to obtain the best educational experience and qualifications. In a project we conducted (Maringe, Foskett, & Roberts, 2009) when the new fees regime was announced in the UK, the majority of students said that fee increases would neither deter nor dampen their aspiration to access higher education. A strongly representative sentiment was captured by one of the students who said:

> I will survive on jam sandwiches for the next three years in order to have a university education ... whether they charge £10,000 (at that time the fees were being increased from £1500 to £3000 per year), it does not make a difference to me.

Hemsley-Brown and Foskett (1999) have also observed that the value attached to an educational experience seems to be directly associated with price; the higher the price, the higher the perceived associated quality. In education, therefore, competing on price may actually yield negative equity in terms of attracting the best talent to educational programs (Gibbs, 2008). Although inconclusive, there seems to be anecdotal evidence to show that a very small segment of part-time, mature, and working adult students tend to be more influenced by price differentials in their decisions about where to do their courses. The majority of younger, full-time, and straight from school/college students tend to be largely price insensitive when it comes to decisions about where to study (Maringe et al., 2009).

The fourth phase of marketing grew at a time when the notion of the primacy of the customer was gaining momentum. It came to be known as the customer orientation to marketing. Primarily, the philosophy argues that the essence of any business is to anticipate and satisfy customer needs, that customers are the raison d'être of any business and that it is exclusively their view that matters. Customers do business with institutions because they are seeking solutions to their own problems, and their satisfaction with what the business provides in the business exchange is paramount.

According to this perspective, complete customer satisfaction is the omnipotent focus. As some travel business organizations would argue, they are not just selling a holiday but a complete experience. Customers need to be delighted from the first point of contact, whether by entering a website or the doors of a shop, through the sales encounter, to the after-sales experience. In education, it is this idea of customers that riles many critics and commentators. Many people do not look at the educative process as an exchange encounter based on money and goods changing hands; rather, they see education as a process of knowledge building, in which teachers and students play a role in the creative process (Gibbs, 2011).

However, this does not suggest that the importance of students should be marginalized. On the contrary, it implies that if teachers and students are cocreators of learning, it becomes vitally important to develop a mutual understanding in terms of their learning needs and nascent competences as a fundamental basis for sustaining this creative process. Elsewhere, and in line with contemporary thinking in this area (see, for example, Baron, Warnaby, & Conway, 2010; Gronroos, 2009), I have defined marketing as a value creation process, through which those involved create and cocreate the value they need (Maringe & Gibbs, 2009). Whether we call them customers, consumers, clients, or simply students, what happens in educational institutions does not follow the classic rules of exchange and purchase, but sees learners as active producers of knowledge. However, teachers have a vantage point over this process as they can use their greater experience and wisdom to guide the process of cocreation in ways designed to enhance the overall learning quality for both.

Finally, Kotler (2003) argues that contemporary business is increasingly being required to demonstrate a heightened sense of ethical practice, equity, and social justice with a strong commitment to lowering its carbon footprint and to sustainable development. He argues that these are new and fundamental societal requirements that need now to constitute the basis of the new marketing idea. He calls this societal marketing. In education, we can draw parallels. For example, as a consequence of increased globalization that has resulted in greater networking between societies, deconstruction of nation statehood, removal of geographical boundaries between nations, and greater movement of talent between societies, classrooms, and other educational and learning spaces have become demographically heterogeneous. More than ever before, in many educational institutions we have very mixed groups of learners in classrooms from different parts of the world. The need to be seen to be fair has become the contemporary educational imperative underpinning the basic tenets of educational marketing, in the way opportunities are opened up for these mixed groups by distributing instruction, including how pedagogy is developed around learner needs rather than teacher competence. It is a marketing philosophy which privileges responsible, ethical, and sustainable educational practice, and recognizes the importance of the other in the pursuit of the school's educational goals. It is an outward-looking marketing philosophy designed to marshal the collective energy of various constituencies with a stake in the progress and success of the school. Therefore, marketing in schools is about nurturing relationships with clients and constituencies in order to build the values the schools need. This brings us to the second aspect of this paper.

THE GROWTH OF RELATIONSHIP MARKETING IN SCHOOLS

Sayer (1989) argues, for example, that four waves of pressure have combined to push schools from what previously was a "monastic" existence, in which schools operated as secret gardens, secluded from the communities they served and pursuing their goals with total disregard of outside influence. In the United Kingdom, for example, first was the advent of comprehensivization, a process designed to address the preceding exclusive and discriminatory tripartite system. Under this, "a differentiated system of education existed, which deliberately reinforced class inequalities through directing pupils toward substantially different opportunities'' (Maringe, Johnston, Fuller, & Heath, 2011, p. 52). The system directed schools to admit pupils of all abilities, and parents, their respective communities, and external professionals were expected to play an increasingly prominent role in the affairs of these new schools, leading to the concept of the community school movement in the United Kingdom in the early 1970s (Foskett, 1992).

A second source of pressure came from the emergence of Local Education Authorities (LEAs), under which schools somehow lost their sole responsibility for self-governance. LEAs were created to oversee issues of quality and fairness in schools and to monitor the processes of comprehensivization in the new schools. Suddenly schools had to report to an outside body and demonstrate accountability for serving their communities and pupils in ways that reflected the ideals of comprehensivization. New management structures were created, including outside bodies and organizations, in order to form the necessary accountability processes and monitor educational quality.

Third, as a consequence of multiple pupil abilities in the new schools, it became imperative for educational institutions to discover new ways of teaching and pedagogy to cater for the wide range of intellectual capabilities in the learning community. Some of these new ways of teaching and learning required the development of work-related experience. This necessitated stronger external involvement and the need ''to draw on outside resources, expertise, and personnel'' (Foskett, 1992).

This led to the fourth wave of pressure. Schools began to see a need to work together and with colleges and other outside organizations to meet the more diverse needs of an increasingly heterogeneous pupil population. Various education acts required schools to embed the principle of progression to prevent artificial boundaries between primary, secondary, and post-compulsory learning. For example, the Education Reform Act of 1988 laid emphasis on compulsory education for children aged 5–16. Schools thus formed consultation groups with other schools and colleges to determine ways in which this could be achieved. On the whole, these waves of pressure have underlined the importance of working together, and of creating coalitions and collaborations between schools and the various constituencies around them. As a result, school responsiveness became a precondition for survival, making the idea of ''open schools'' a reality (Bush, 1992). Responsiveness meant that schools had to adopt various forms of partnership models for working, to learn new ways of involving others in determining goals and objectives for their schools, and to allow the public to become more visible in the operations of their schools including central decision-making and core curriculum matters.

In the new global environment, the importance of partnership working and hence relationship marketing has significantly increased. Demographic heterogeneity in schools has grown due to expanding cross-border movement and talent migration between nations, and especially from south to north. There is a growing realization that education systems are increasingly facing similar kinds of pressures for resources, for quality maintenance, for reforming their pedagogies, and for delivering an education that addresses global issues of poverty, famine, disease, wars, drought, and sustainable development. This realization requires institutions to work together rather than in isolation, as borders gradually become irrelevant and as the need to synergize becomes more important in an environment of financial and resource scarcity across all education sectors (Sakamoto & Chapman, 2011).

THE PRACTICE OF RELATIONSHIP MARKETING IN SCHOOLS

In practical terms, schools generally mobilized the following structures and processes to pursue the external relations function. First has been the creation of external relations departments or offices in many schools. In some schools, such offices are variously known as public relations, external liaison, partnership, school–community partnership, or international offices, for example. The names tend to reflect the key function they were designed to serve and also suggest the school's philosophical positioning or approach to relationship marketing. Second, schools developed some type of external relations strategy that, in the majority of cases, tends to be a list of functions and aspirations. As Smith, Scott, and Lynch (1995) have noted, in many parts of the world, relationship marketing remains an important but nevertheless marginal and inconspicuous aspect of the overall scope of school management. In addition, personnel associated with these new departments have tended to be drawn from a variety of fields, chiefly public relations. In many schools and colleges, the heads of these units are academics, with little or no professional background in marketing or external relations marketing. Third, the processes of relationship marketing tended to focus on a range of activities such as collaborative meetings with school partners; promotion activities to stimulate school enrolment activity; planned visits to potential recruitment markets; organization of open day activities aimed at selling the schools' strengths to potential customers, and, in some more sophisticated instances, the development of simple but powerful branding messages on school uniforms, books and stationery, memo pads, and official logos and designs. In general, therefore, relationship marketing in schools has been targeted at a range of purposes and activities which include (see Devlin & Knight, 1990, for an extended discussion of these roles):

- Recruitment purposes; working with feeder schools (schools which supply pupils to the next level of education). This function has generally involved providing advice to parents new to the area through churches, public libraries, estate agents, the LEAs, citizens advice bureaux, relocation offices, hospitals, and local clinics, among others. Schools tend to produce branded leaflets which they drop in these areas.
- Lobbying purposes; schools created lobbying groups to work alongside local MPs, local chief executives in education, teachers' unions, and the local and national media to promote school activities and create a platform for projecting a greater visibility and acceptability of their philosophy, strategy, accomplishments, and challenges to the broader society.
- Creating industry links; schools had career teachers who worked with children and business organizations, Chambers of Commerce, and local and national business leaders to provide work experience as an integral part of learning, thus promoting greater learning relevance through integration of theory and practice and laying career foundations and aspirations for their children.
- Staff recruitment purposes; in order to recruit the best staff, schools created partnerships with universities and colleges offering initial teacher training, in-service education and training (INSET), teacher associations and unions, local media, and the LEA.

Conspicuously absent from these purposes of relationship marketing in schools are the issues of classroom learning and pedagogy directly underpinning curricula practice, including working in partnership with parents. The classroom has thus remained a secret garden in which teachers feel comfortable to work with no outside influence. Consequently, apart from the multiple challenges presented by the partnership model of working, it can be concluded with some confidence that relationship marketing in schools has remained a peripheral activity operating on the sidelines of the core purpose of schools, that is, teaching and learning. Before moving to this central argument of the chapter, a summary of key challenges associated with relationship marketing in schools will be briefly outlined.

BARRIERS IN IMPLEMENTING RELATIONSHIP MARKETING IN SCHOOLS

Research over the years (see Foskett, 1995; Foskett & Hemsley-Brown, 2001; Keen & Greenall, 1987; Maringe, 2003, 2011; Megson & Barber, 1986; Molesworth, Scullion, & Nixon, 2011; Smith et al., 1995) has consistently shown that, despite its perceived importance, relationship marketing and the whole idea of marketing in educational institutions have been faced with many challenges including:

- *Marketing as an intrusion of an alien concept in education*: because of its origins in business, marketing and thus relationship marketing have always been treated with suspicion and skepticism by those who work in schools, especially teachers. Many consider these concepts to be incompatible with the supposedly pure purposes of education (Maringe & Gibbs, 2009).
- *Marketing and education as working at cross-purposes*: marketing has generally been seen as a gimmick to increase business profits, while education has been considered to have no profit motive. It is seen as a spread of commercial ideas to a supposedly more altruistic world of education. Many see this as the commodification of education, characterized by a growing consumerism that is seen as the antithesis of education. Furedi (2011, p. 6), for example, makes the point that:

> … the provision of academic teaching does not fit easily into the paradigm of consumption … commodification inexorably leads to standardization, calculation and formulaic teaching … and transforms the academic relationship between teacher and student into a transaction dominated by concerns which have little to do with education.

- *Marketing as endorsing the ascendancy of managerialism in education*: educators in schools, colleges, and universities have been critical of the increasing managerialism that has crept into the sector (see, for example, Deem, 2001; Meek, Goedegebuure, Santiago, & Carvalho, 2010; Peters, Fitzsimons, & Marshall, 1999; Politt, 1990). It is claimed that managerialism has transformed schooling into units of financial efficiency and focus and, as Fitzsimons (1999, p. 2) asserts:

> Managerialism – at least as the orthodox account of domination would have it – is a totalizing technology that subsumes education to its discourse through what appear to be legitimate practices (including the language of efficiency and quality …).

Relationship marketing in schools and colleges is thus seen as not only endorsing this growing managerialism, but entrenching it through the creation of new governance structures, language, and culture that diminish the role of education institutions as places of learning and teaching while transforming them into factories run on industrial models of efficiency, effectiveness, and quality. The perception is that these new management structures focus more on the bottom line than on educating young people.

- *Strategic weaknesses*: our research and that of others suggests that, while marketing and relationship marketing have become key strategic areas of the development of educational institutions, their enactment in institutions is rarely supported by specific strategy documents. In the majority of cases, a marketing strategy is only visible as a part of the overall strategic plan of the institution. As such, despite its growing importance, relationship marketing has not grown sufficiently to assume an independent and key status in the overall scheme of strategy in educational institutions. However, it has to be pointed out that the picture is far from uniform. In the developed countries of the West, the formulation of separate educational marketing strategy documents has been increasing over the years. In 1995, Smith, Scott, and Lynch estimated that there was a likelihood of finding only one in every ten institutions, but more recently popularity has grown to there being one in every four (Maringe, 2005). The picture in the less-developed world is markedly different. In a study of marketing in universities in the Southern African region, Maringe and Foskett (2002) found that none of the 15 universities participating in the study had a separate marketing strategy document.
- *Leadership inadequacies*: the leadership of relationship marketing and marketing in general in schools, colleges, and universities has been deficient in many ways. While the picture is not uniform across sectors and between countries, our overall sense is that these new functions are not led by people with specific training and experience in the field of marketing. Although there is a clear sign that these functions are overseen by very senior people in institutions, often at the level of deputy vice-chancellors, directors, and deans in universities, or heads or deputy head teachers and senior teachers in schools, and directors and head of departments in colleges, there is less evidence that these leaders have previous training in related fields of marketing. Relationship marketing could be said to be growing in the sector following a semi-apprenticeship model that relies on unqualified experience as the best teacher.

Relationship marketing therefore faces two important challenges in educational institutions; the first seems to be a lack of strategic fit with the core purpose of the institutions and the second seems to be a lack of leadership capacity to drive the agenda. The Context, Organization, Research, and Development (CORD) theory (Maringe, 2003) has been developed to specifically address these issues. Before turning to this, however, we need to emphasize the central place of the curriculum as the key purpose of schools and other educational institutions.

CURRICULUM AS THE CORE PURPOSE OF SCHOOLS

The concept of curriculum dates back to the Roman Empire when it was used to describe a racecourse for horses with chariots. Its use in education has an equally long history based on a variety of often conflicting and sometimes overlapping meanings. Despite its long history, it has generally failed to become a rallying point for critical decisions, especially at university level (Ajibola, 2008; Pollard & Triggs, 1997) in the same way as concepts such as assessment, evaluation, and pedagogy. The problem is that the notion of curriculum may mean different things to different people.

For example, for some people curriculum is associated with official documents such as syllabuses and schemes of work that spell out what teachers have to teach at different times of the year. This represents curriculum as a tangible product (Kotler, 2003). For others, especially those who have little faith in the ability of schools to change pupils' lives, the curriculum is that which pupils experience despite the efforts of the school (Stenhouse, 1975). This is sometimes referred to as the hidden curriculum, a very powerful yet subtle means by which learners make adjustments in various ways to contemporary ways of living. Marsh (1997) argues that the hidden curriculum in many cases has a more profound effect on the development of children in schools, while for others curriculum is what the children actually experience under the auspices of the school, regardless of what teachers plan for them to experience. This conceptualization of curriculum overlaps in meaning with what other authors refer to as the "received curriculum" (Young & Leney, 1997). Other common curriculum conceptualizations emphasize the pedagogical elements including curriculum as transmission, as praxis, and as experimentation (Smith, 1996). Thus, curriculum can be a tangible product such as a key school document that summarizes what students are expected to learn. It can also be a process, emphasizing activities and pedagogical approaches used in schools to deliver the learning program. Others, however, view it as the actual experience learners and teachers go through under the auspices of the school. All these are legitimate conceptualizations. Broadly speaking, educational institutions serve three major purposes. First, they are places for teaching and learning. Second, they provide space for the discovery of new knowledge. Lastly, they provide space for networking with multiple groups in society to pursue local and broader societal objectives. These three ingredients provide a focus for the work that schools do in society and constitute the curriculum of schools. On that basis, curriculum shall be defined as the critical mission of schools, identified in relation to its educative, knowledge creation (research) and enterprise purposes in society.

Different educational institutions place varying emphasis on these three central purposes. For example, primary and secondary schools generally place greater emphasis on the educative function and tend to see curriculum in terms of teaching and learning only. Universities and colleges tend to have a broader remit that encompasses the three areas, albeit to varying extents. Some universities are teaching-focused, others research-focused and still others define themselves as entrepreneurial universities, suggesting a more focused attention to the societal mission. The danger in education lies in the reification of these elements of their core purpose. Teaching and research are sometimes seen as incompatible activities that are not mutually supportive. This we believe to be a fallacy. Universities tend to separate these on the grounds of convenience, as it is easier to set up various work contracts for people with different qualifications and experience. Those who join the university with less research experience are asked to take on more teaching responsibilities, while those with more research experience sign up for research contracts. Sadly, universities are also funded separately for their teaching and research responsibilities, exacerbating the dichotomy between research and teaching. The third mission of educational institutions that defines their enterprise purpose seems to be the area in which the growth of relationship marketing has flourished. However, this mission is perhaps the most detached in the curriculum framework of educational institutions. It is also, as we have seen, one that has the least developed leadership competence and one that is routinely accused of importing borrowed wisdom from the business world and hence corrupting the world of education. Yet, as demonstrated previously, it is a vitally important aspect of the educational curriculum.

There is therefore a case for arguing for a curriculum-focused marketing model in educational institutions.

A CURRICULUM-FOCUSED MARKETING MODEL FOR SCHOOLS

Given the centrality of the curriculum and the absence of a curriculum-driven model for the practice of educational marketing, it became necessary to examine how best marketing and a marketing orientation could be brought into the domain of education and school. Maringe (2003, 2005) has developed a curriculum-focused model for higher education marketing (the CORD model) aimed at achieving greater integration of the core purposes of educational institutions through which institutions may develop a more homegrown marketing framework. It is argued that this model may also be applied in schools in different parts of the world. However, caution needs to be adopted in application of this model in schools, as it was originally developed for higher education environments. The model can be argued to have wider application, as it always begins with a contextual analysis which precedes everything else. The model has four key elements.

Contextual understanding: Any aspect of change in education requires a full understanding of the context of change. That context requires those dealing with the change to have a full grasp of the current status quo; to understand why things are what they are currently; why the status quo is no longer fully supportive of new developments; how the world is changing around us; what changes are needed locally; who has tried similar changes and with what results; how the change might cause organizational disruption; how to rally people's support for the new idea; how success will be measured and celebrated; and how failure might be recognized and minimized. As suggested above, such questions need to be asked in the context of the school level.

Organizational competence: Organizational change requires the support of the entire organization. People need to be prepared both attitudinally and in terms of skills and commitment to undertake the change that is needed. This requires setting up teams for various tasks; ensuring that people develop group working skills; developing achievable work plans; providing adequate resources and incentives for the new development; developing group designs for the work to be achieved; and training the leadership for group involvement.

Research competence: Research is an integral part of the work that goes on in all educational institutions. It a systematic way of developing new knowledge and understanding, so research skills are needed by those undertaking change activities in institutions. The levels of sophistication may vary depending on the nature of task, but fundamentally the skills are needed to help the group to identify and ask the right questions; develop the appropriate instruments for gathering data; gather the data in the most appropriate and efficient way; evaluate the data for its usefulness in problem solving; and evaluate the usefulness of the identified solutions.

Development competence: a change development process that seems most suited to educational institutions tends to encompass the traditional elements of objectives, content, processes, and evaluation. This is based on the classical Tyler (1949) rationale that has historically provided an overarching framework for teaching, learning, and assessment. Apart from its application in teaching, this framework has wide application in other areas of human endeavor, and indeed can be used in the application of a marketing framework in educational institutions. However, as indicated earlier, one of the key challenges in adopting a marketing orientation in educational institutions is the issue of an appropriate leadership.

Research has consistently discovered that the application of new ideas in educational systems is frequently hampered by lack of appropriate leadership (Foskett, 1995; Maringe, 2003; Oplatka & Hemsley-Brown, 2004). It is thus important to focus on the development of appropriate leadership for marketized schools.

DEVELOPING LEADERSHIP FOR MARKETING IN EDUCATIONAL INSTITUTIONS

Leadership is variously defined in the education literature. Some view it from a trait perspective as the inherent, fixed, and innate capabilities and qualities in those who lead (Zaccaro, Kemp, & Bader, 2004). This perspective, however, has the weakness of subjectivity and does not provide meaningful scope for developing school leaders, as it is generally not possible to be trained for traits. Others see it from a skills perspective in terms of the technical, human, and conceptual skills needed to mobilize organizational effort toward needed change (Mumford, Zacarro, Connelly, & Marks, 2000). Although skills are generally transferable and can be developed in people, the perspective provides a range of skills that are not dissimilar to traits. Yet others see it from a behavioral perspective that sees leaders as exhibiting concern either for human relationships or for task accomplishment (Blake & Mouton, 1985). Behavioral approaches share a weakness, in that there seems to be insufficient evidence relating leadership styles to organizational productivity. The term has also been explored as a situational process (Hersey & Blanchard, 1993), where leadership processes change in accordance with the context and situation; as a transactional process through which followers are rewarded for achieving leadership objectives; and as a transformational process through which leaders seek fundamental organizational transformation through idealized influence, inspirational motivation, intellectual stimulation, and individual consideration (Bass & Avolio, 1995). More contemporary conceptualizations include leadership as a distributed process, calling for the decentralization or democratization of leadership roles across the organization (Leithwood, Day, Sammons, Harris, & Hopkins, 2006); and authentic leadership, based on intrapersonal and interpersonal relations developed as a basis for achieving group motives (Shamir & Eilam, 2005). Although these different perspectives can be somewhat confusing, there seems to be one underlying feature that cuts across all leadership conceptualizations. This is the issue of influencing others to achieve identified goals. Leadership is thus a value creation process where leaders and followers set out to achieve commonly identified goals, thus creating the value they need. In the context of schools, marketing leaders then seem to require five broad intelligences or competences to enable them to work productively within the CORD model described above. These are contextual intelligence; organizational and strategic intelligence; researching intelligence; curriculum development intelligence; and, finally, value creation intelligence. To some extent, the first four have already been discussed. In this section we therefore focus on the leadership intelligence/competence of value creation as the central focus of leadership development.

The underlying idea behind the leadership intelligence/competence unites the concepts of marketing, curriculum, and leadership in the educational context is the notion of value creation. This is basically the process that allows people to achieve the goals to which they aspire and those of the organization and the society they serve. Depending on their circumstances and stage of development, schools tend to seek the creation of value around aspects of teaching and learning, their knowledge creation responsibilities, and their enterprise agenda. In order to lead this process of value creation, leadership needs to be developed that can identify the current value being delivered by existing actions and why this is no longer tenable; why achieving the new value is important to the organization; how other organizations might be achieving the same value; the resources needed to achieve this value; the processes needed to achieve this new value; and how to achieve the value needed both efficiently and effectively. Table 1 provides a summary of how the CORD model may be applied to create value around the key curricula issues of teaching/learning; knowledge creation/research; and enterprise. In each cell are a series of key questions educators need to ask themselves under each of the key elements of the CORD model. Used this way, the model provides a basis not only for the application of marketing in schools, but for integrating marketing more comprehensively into the work of these schools. It is a model designed to create the value schools need across the three broad areas of the curriculum. It is a homegrown model for integrating marketing into the operations of the school that places value creation and needs-based curriculum development at the heart of the mission of the school.

CONCLUDING COMMENTS AND IMPLICATIONS

Globalization has increased the need for adopting a marketing approach in the way the business of schools is conducted. Although marketing is highly valued in educational institutions, it nevertheless is a concept people in schools work rather cautiously with. Its origin in the world of business and focus on financial gain makes it a contestable idea in the world of education.

Of all marketing approaches, relationship marketing seems to be that most widely developed in educational institutions. This is because schools, again as a consequence of increasing globalization, work with multiple organizations to create the value they need. Sadly, evidence suggests that relationship marketing has remained peripheral to the core business of schools (Devlin & Knight, 1990; Foskett, 1995). It exists as an ''add-on'' activity in many institutions and is certainly not properly integrated into the core business of schools. Moreover, neither is it led by personnel with an adequate background and experience in its implementation.

The chapter has argued that this integration could best be achieved by viewing the core business of schools as being the development of their curriculum. To do so, there is need for leaders with a range of leadership intelligences that enables them to work effectively in marketing-driven ways. Such leaders require competences in analyzing the context of new developments; organizational competences; research intelligence and development competences. These competences were identified from the CORD

Table 1. Integrating Relationship Marketing and Leadership of Educational Curricula.

Elements of the School Curriculum	Elements of the CORD Marketing Model			
	Context	Organization	Research	Development
	Key Questions to Guide Development			
Teaching/ learning	1. What new value is generated for learners by teaching this topic? 2. How does teaching the topic meet the prevailing needs and values of the local community and of society at large? 3. What experience of teaching this topic can we learn from elsewhere?	1. How best could the learning in this topic be efficiently and effectively organized? 2. How should we plan for both individual and group learning in this topic? 3. What resources are needed in order to make learning both efficient and effective?	1. What research evidence is available that learning this topic brings value to learners? 2. How do we know that this topic will meet the needs of both learners and society? 3. What research is available that demonstrates that the planned approaches work? 4. What research could learners meaningfully undertake to enhance the quality of their learning in this topic?	1. What specific objectives will drive learning in this topic? 2. What content and pedagogical approaches are likely to yield the most value for the learners? 3. How will we measure learning and determine that the anticipated value has been created? 4. How might the value creation process be improved next time?
Knowledge creation/ research	1. What value is likely to be generated for the individuals, the organization and society through the envisaged research?	1. Who should we partner with in undertaking this research and why? 2. What teams do we need for undertaking various aspects of the research and what will	1. What is the overall quality of evidence associated with this area of research? 2. What research strategies and approaches have	1. What specific objectives will the research be designed to accomplish? 2. How will valid and reliable data be

	2. What is broadly known about this area of research and what is less well known? 3. How might this research contribute to the broad values of the organization and those of our society?	be their specific and collective roles? 3. What resources will be needed to enable the efficient and effective conduct of this research?	generally been used in this area of research? 3. What approaches are likely to yield the best results for our research and why?	gathered to answer specific research questions? 3. How will we know if we have generated new knowledge and understanding? 4. How might the new knowledge and understanding be shared more widely, evaluated and applied?
Enterprise/ societal agenda	1. What value does society think we bring as an institution? 2. How does society evaluate our contribution relative to similar organizations? 3. What value do those we seek to work with bring to the table and why is it important to work with them?	1. What models of collaborative working need to be established? 2. What value do these partnership models bring to us and others participating in the enterprise activities? 3. What resources are needed to enable efficient and effective value creation through this partnership?	1. What research and evidence are available to show that what we plan to do works? 2. What research and evidence are needed to further the goals of enterprise and partnership? 3. How do we democratize research participation to enhance quality, usability, and relevance?	1. What will be the specific objectives of the enterprise activity? 2. What specific approaches will be used? 3. How will we know if the goals have been achieved? 4. How might the outcomes be more meaningfully used and applied?

model previously developed by the author. Because marketing is about the creation of value people need, these competences have to be developed around the key elements of school curricula. The chapter has thus provided a working model that shows how this can be applied to the areas of teaching and learning; to research; and to the enterprise agenda in educational institutions.

For relationship marketing to become more integrated into the core business of schools, it seems that the following must be accomplished:

1. *The need for a school-wide attitudinal change that embraces the centrality of the market in education*. Given the skepticism associated with bringing the idea of marketing in education, it seems logical to start with this. Teachers are more likely to accept the idea if we can use a language that is broadly compatible with that used in educational discourses.
2. *The need to develop a home-grown marketing philosophy in education*. Both in terms of its language and the range of approaches it has adopted, marketing in education that is based on value creation and meeting the needs of those involved is likely to be more readily adopted than the current approaches that use imported language and techniques.
3. *Wider application of the CORD model*. The CORD model is both a home-grown marketing model and one that may be applied to a wide range of school level activities. It is developed on the basis that the main purpose of schools and other educational institutions is encapsulated in their curriculum proposition. Both for instructional and noninstructional aspects of schools, this model seems to have wide applicability and is relatively easy to use.
4. *Developing appropriate leadership for relationship marketing in schools*. Leaders with multiple intelligences in areas of context analysis, organization, research and development, and, in addition, value creation intelligence will need to be developed in schools. Perhaps this framework could be useful in training school leaders more generally and in reconceptualizing the idea of contemporary leadership in a globalizing world.

Evaluating the classic '4Ps' of marketing in the educational sense. The *P*roduct of marketing in education will be evaluated by the extent to which it delivers value needed by those engaging in the process. Its importance will be measured by the value it adds to people's value sets. The *P*rocesses of educational marketing will be evaluated by the extent to which they are inclusive and reach out to the competences of various constituencies in the marketplace. The processes need to be those that enable principals and headteachers to be cocreators of the value they need, rather than to act as passive consumers. In terms of *P*rogram, the key elements will involve working as teams and basing the utilization of resources on efficiency and effectiveness criteria. Finally, the aspect of *P*romotion in education has to be treated with caution. It is assumed that programs will be designed to meet the real needs of people and that the most appropriate form of promotion in education will be ''word of mouth'' recommendation from satisfied users. More formal advertising of programs works best if they incorporate such evidence from those who have experienced the programs.

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MARKETING THE SCHOOL 'REVISITED': THE COMPLEXITY OF LEADERSHIP DILEMMAS

Tristan Bunnell

ABSTRACT

The 1980s and 1990s saw a significant phase of educational marketization reform in several countries. Schools began to operate within a 'market', and 'marketing' became more important. Research showed that teachers and school leaders were largely hostile to this 'alien' area of schooling. School leadership in this environment became more complex and stressful. Literature began to identify leadership tensions, conflicts and dilemmas. This chapter 'revisits' some of the more significant research at the time and examines some of the dilemmas posed by the need to market the school. The dilemma framework offered by Wildy and Louden (2000) is used to explore three key areas: accountability*,* efficiency *and* autonomy*. The chapter offers insights into how this topic can be revitalized and explored within the operation of 'new' leadership paradigms such as 'distributed leadership' and 'destructive leadership'. The chapter concludes by discussing how the topic of dilemmas can be taken forward.*

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MARKETING THE SCHOOL

The Research Context

It is generally accepted by the research field of educational marketing concerned with marketing *the* school (not to be confused with marketing *in* schools, a discrete topic concerned with the commercialization rather than the marketization of schools) that marketization reform, since the 1980s in a number of countries, has posed a number of (extra) dilemmas for the person responsible and accountable for the action, that is the school leader or principal. Although the emergent marketing culture was highly localized and dependent upon socio-economic and politico-geographical environments (Foskett, 1998, p. 200), thus generalizations have to be drawn with caution, early research into marketing the school had shown that the principal is chiefly responsible for the marketing task whilst teachers' explicit commitment to involvement is low (James & Philips, 1995).

The notion that marketing the school has led to leadership dilemmas has since been well documented by research. Oplatka and Hemsley-Brown (2004, p. 381) in their discussion of 'current issues and future directions' identified three major issues that had been raised by marketing the school research (they had identified 25 significant studies, mainly from 1993 onwards): marketing is indispensible for schools, it is generally viewed negatively in education, whilst 'the need to market the school engender major dilemmas for principals and staff'. Here lay a major contradiction: teachers and principals were saying that they knew marketing was important if not vital but they didn't like it and didn't really want to be involved. This gives a major clue as to what the concept of 'dilemma' might mean in the context of school leaders. Not surprisingly, a focus on the ethical dimensions of leadership has become a key theme in the educational leadership and management literature (Cranston, Ehrich, & Kimber, 2004, p. 3).

Research into marketing the school revealed the fact that much marketing activity was also management activity, that is it was 'part and parcel' of everyday organizational reality within a school, such as open days, information evenings or parent conferences. In other words, it was more than direct (transactional-based) marketing activity such as brochures and advertising. In this context it theoretically involves *all* of the people who work in the school, not only the principal. As noted by Foskett (1998, p. 199): 'Marketing will not be confined to the marketing team but will be central to the organizations' whole approach'. However, this approach is difficult to utilize in practice. To some educators it is seen as a painful necessity and a distraction from teaching: 'the marketing of education is still a concept viewed with considerable distaste' (Bradbury, 1990, p. 46). This issue immediately poses a set of dilemmas for school leaders: how can the principal involve teachers? How far can marketing activity be delegated or distributed? What would happen if teachers who are hostile to marketing got involved?

Wildy (1999) notes that educational literature often uses the word 'dilemma' to mean ambiguity, uncertainty or difficulty. However, in a more literal sense dilemma involves a choice; school leaders face incompatible and largely inescapable courses of action. Marketing the school may be inescapable and necessary but it seemingly conflicted with educational values and school missions. Oplatka and Hemsley-Brown (2004, p. 382) further noted that 'Given the negative notion of marketing among school members who are forced to engage with it in their work, it is not unreasonable to find an emergent dilemma reported by many of them worldwide'. These researchers added (p. 383) that given the conflict between marketing and educational values: 'principals and teachers reported major dilemmas they recently had to deal with in their work'. These two researchers concluded their study (p. 394) by suggesting five areas of study to take 'the field further'. One of them was the need for more research into the ethics of school marketing, since exploring this topic 'will increase the understanding of the dilemmas that principals and teachers face in competitive arenas'. Maguire, Ball, and MacRae (2001, p. 49) concluded their study of marketing practice in a school in London by stating that one of the main ongoing research areas is to 'understand dilemma resolution'.

This chapter aims to 'flesh out' some of the specific, often connected leadership dilemmas (incompatible courses of action) posed by marketing the school so that they can be further discussed and researched into. Research in New Zealand (among kindergarten headteachers) showed that while schools leaders can identify issues that signal the presence of dilemmas, they were unable to *articulate* leadership dilemmas clearly and thus were unable to confront them successfully (Cardno & Reynolds, 2009). This chapter aims to present a framework for taking this issue forward.

The Historical Context

The context for the complexity of leadership dilemmas was that the educational reforms of the 1980s and 1990s saw 'alien' forces introduced into schooling: 'market forces' and the paraphernalia of the market system

(Ball, Bowe, & Gewirtz, 1994) was introduced in a number of different countries. Policies such as the *1988 Education Reform Act* in England and Wales encouraged greater self-management, accountability (e.g. national testing, National Curriculum, quality control mechanisms) and competition among schools both by introducing new types of schools (promoting diversification) and by increasing the ability of parents (i.e. the consumers or customers) to make informed choices.

School leadership in this postmodern (Farrell, 2001) environment became even more problematic and 'messy' with increasing pressure to promote collegiality and greater collaboration within the school community. As reported by Jones (1999b), the role of the school leader changed, and the principal had to deal with a wider range of demands from a wider range of stakeholders. In other words, the emergence of educational marketization made school leaders more *accountable* to a wider range of people. At the same time, school leaders were presented with professional and ethical challenges that had not been as evident before, as the climate of school leadership changed. There has, for instance, been much research interest (e.g. Ball, 2003; Brantlinger, 2003; Power, Edwards, Whitty, & Wigfall, 2003) in the relationship between class and school choice, especially exploring the politics of class privilege and how middle-class families 'manage' school choice as a facilitator for social positioning and educational advantage. The advent of the 'market' in schooling therefore created a political and ethical dilemma for many educators.

At the same time, schools were encouraged to compete through data on performance such as exam results. A number of 'quasi-markets' appeared within the educational system (Maguire et al., 2001) based upon an assumption (partly false) that parents choose schools in a rational manner (i.e. they are 'alert' parents, Willms & Echols, 1992); when confronted with quantitative material and data and would seek out 'high performing' schools, thus exposing the weaker ones. Schools were placed under greater pressure to create an 'image', or 'brand', and a 'reputation' in this more competitive and diversified environment, even though concepts such as the 'market' and 'marketing' were, as already said, largely 'alien' (Foskett, 1998). As noted by Cave and Demick (1990, p. 70), prior to the 1980s 'marketing was considered unprofessional and the idea that schools were in the business of selling a product was widely rejected'. Schools came under more pressure to attract and retain pupils, thus marketing became important, if not vital, for a school's financial survival. In particular, *relationships*, both inter- relationships and intra-relationships, became important.

The Marketing Culture

Not surprisingly given the aforementioned developments, Foskett (1998) revealed how a definite marketing culture had appeared in schools in England, although exact practice and attitude differed widely. Further not surprisingly, the nature of school leadership changed greatly during this period of reform. The role of the school leader grew, became more complicated and more stressful as a result of marketization (Jones, 1999a). This is a process that seemingly occurs during any period of educational change. Hargreaves (1994, p. 4) explained how multiple roles can lead to overload in the 'postmodern' school: 'the teacher's role expands to take on new problems and mandates – though little of the old rule is cast aside to make room for these changes'. Educational marketization introduced new uncertainties and ambiguities about the role of the principal and the school faculty. It was remarked (Oplatka, Foskett, & Hemsley-Brown, 2002b, p. 433) that 'heads may find themselves raising questions regarding how well they perform their job and what their tasks are'. This (role ambiguity and job dissatisfaction) in turn can be a factor of stress.

The role of the school leader expanded greatly as a result of educational marketization. The role of the primary head in England reportedly became more than that of 'chief executive' (McEwan & Salters, 1997). Birch (1998, p. 63) noted that school leaders now 'need to be accountants, human resource managers, administrators (perhaps even teachers!), they also need to be experienced marketers, equipped with the marketing knowledge that fills so many pages of text books'. Downes (1998, p. 25) echoed this statement: 'In the last decade, heads have had to learn about financial management, legal and personnel issues; they have had to become public relations experts and negotiators with industry and government agencies'. The scale of role expansion is exemplified by one survey in the United States which showed 38 different 'roles' of principalship (Wanzare & Da Costa, 2001).

This issue led to a number of personal and professional dilemmas. The study by Jones (1999b, p. 491) among 12 primary school principals in south Wales revealed that 'the heads reported that they found it difficult to deal with all the demands of the job to a standard that they found satisfactory'. One study (Grubb & Flessa, 2006) among schools in the United States concluded that policy initiatives over the past two decades have meant the role of principalship is too big for one person. This presents both an *autonomy* dilemma (i.e. should the principal delegate or distribute activity?) and an *efficiency* dilemma (i.e. what tasks will not be carried out satisfactorily if they don't?).

School leadership is a complex and ambiguous task involving a number of competing and conflicting roles that add to create a 'conceptual fuzziness' (Goldring & Greenfield, 2002, p. 1). The educational reforms of the 1980s and 1990s, focused upon two broad but complementary fronts ('choice' legislation and 'new management': Hartley, 1999, p. 309), fundamentally changed the way schools are managed, greatly adding to the 'fuzziness'. The need to undertake marketing (both in terms of conforming to policy, and meeting the needs of the 'market') placed principals under considerable strain in the sense that they were *forced* to manage the school in a way that they instinctively felt unhappy with (Oplatka, 2002). This presented a further dimension to marketing the school: the *accountability* dilemma (i.e. school leaders were placed under pressure to comply with external pressure).

Marketing the school thus placed school leaders in a difficult ethical position: 'an ethical dilemma arises from a situation that necessitates a choice be made among competing sets of principles, values, beliefs or ideals' (Cranston et al., 2004, p. 3). Foskett's (1998, p. 209) research showed that school leaders 'grudgingly accepted' their new management roles yet marketing the school was seen by the teachers as 'something that senior managers do'. In other words, school leaders were given extra tasks to do, which they didn't necessarily want to do, yet at the same time others saw it as their job. Not surprisingly given this situation, the issue of role overload was being documented early in the 1990s (e.g. Cooper & Kelly, 1993).

Early comment began to appear (e.g. Harvey, 1996) associated with implementing commercial marketing practice within a school environment that was largely suspicious if not hostile to such activity (and which educators little understood and were not really trained to deal with), and which had seemingly been 'imposed' upon schools. Subsequent research literature (e.g. Oplatka, Hemsley-Brown, & Foskett, 2002a) began to identify tensions between market pressures and the more ingrained professional-educational values. Literature (e.g. Bell, 1999) began to identify managing these tensions as a specific area of dilemma (and conflict) for school leaders.

By mid-1990s the conventional marketing mix paradigm was joined by a new phenomenon (Sheth & Parvatiyar, 1995), the viewing of marketing based on the building and management of relationships rather than 'selling' or 'branding' (Gronroos, 1994). Relationship Marketing (RM) logically seems to be ethically more in tune with the views (and values) of teachers. Hartley (1999), discussing the 're-enchantment' of marketing the school, recognized a shift in the role of RM. Initially, educational marketization assumed that parents (as customers) would choose a school *rationally* using performativity data. However, it became clear through early research into parental choice that some parents were more 'alert' than others and some (the 'inert') use more irrational emotive and subjective reasoning. Rotfeld (1999) expressed the view that schools unable to attract top students are tempted to misplace marketing by focusing the attention on 'values', such as the relationship with teachers, other than 'education', such as exam results. However, it wasn't even clear, between child and parents, who actually decides the choice of school. Some research had showed (e.g. West & Varlaam, 1991) that pupils seemed to have a lot of say and wanted to attend a 'friendly' school. In this context, informal relationships (between parents and teachers, teachers and children, for instance) become important, as does the role of the principal.

School leaders faced the dilemma of how to involve teachers in marketing the school. A major finding uncovered by Oplatka and Hemsley-Brown's (2004) review of research was that teachers in the main are hostile to it. This ranges from cynical acceptance to outright disapproval, although it may reveal more about the perceived definition of marketing (as a form of 'selling' and competition) than any overt political or moral stance. Research into teachers' views revealed that a rather blurred view holds. The viewing of marketing as being about 'selling', 'publicity' or 'poaching' was termed the 'marketing myopia' by Levitt (1960). Teachers seemingly instinctively dislike the marketing concept but accept that it may be useful to a school. Oplatka, 2002, identified this phenomenon among Israeli principals as a form of 'contradictory dualism'. Oplatka et al. (2002a, p. 194) concluded that school leaders should face up to the challenge of involving teachers by giving them 'a sense of personal involvement and ownership of marketing events'.

The issue of teacher hostility was complicated by the fact that school principals were not fully prepared for marketing the school. Birch's (1998) study, among 25 primary school principals in England (North Staffordshire), revealed that (p. 58) 'most heads and teachers interviewed do not feel comfortable with the changes, and their vision of the impact is mainly negative'. Furthermore, with respect to school principals, Birch (1998, p. 58) further reported that they, like the teachers, 'basically viewed the concept of operating as a business, an anathema to their ideals'. Tensions and dilemmas relating to competing value systems were identified by Wildy and Louden (2000). Oplatka's (2002) interviews with 10 high school principals also revealed that most knew little about marketing, plus none had marketing qualifications, and none had attended any training course on the topic. School leaders faced a difficult situation in marketing the school – should they admit to the teachers (and parents, and governors) that they are not happy and competent with marketing? This raises the issue of a *respect* dilemma. Headteachers are expected to be able to manage the school yet here was an area of management that few knew much about. At the same time, it is difficult to reveal this to teachers (without 'losing face') even though many of them too are hostile to marketing. The scene is now set for providing a framework for conceptualizing leadership dilemmas.

CONCEPTUALIZING LEADERSHIP DILEMMAS

Dilemma Research

The last decade and a half has seen much investigation into school leadership dilemmas (but not in a marketing the school context). The subsequent research has revealed two key frameworks. Firstly, dilemmas are often conceptualized as involving two largely mutually exclusive decisions and courses of action. Such a framework has been offered by Day, Harris, and Hadfield (2001), in a British teaching context, Castle and Mitchell (2001) in a Canadian setting. In fact, most of the school leadership dilemma research has been undertaken in a British/Canadian/Australia/New Zealand context. The findings needs to be treated with caution as Walker and Dimmock (1999) undertook research among principals in Hong Kong and found that although dilemmas are generic across cultures, the management of them does differ.

A second major framework conceptualizes leadership dilemmas as 'sets' of tension. Murphy (1994) researched into the changing role of the principal in seven countries and discovered four sets of dilemma, one of which was the *accountability* dilemma. Wildy and Louden (2000), in explaining the complexity of principalship identified three key sets: the *autonomy* dilemma, the *efficiency* dilemma and the *accountability* dilemma. This latter framework has already been presented in this chapter and will now be used to further explore marketing the school dilemmas.

The Autonomy Dilemma

Birch's (1998, p. 58) study of primary heads in England concluded that school leaders have had to respond 'to the marketing challenge that has been thrust upon them'. Literature on principal effectiveness (e.g. Blase, Blase, Anderson, & Dungan, 1995) shows that 'being in control' (a form of autonomy) is important for school leaders hence an initial dilemma was one of how, and indeed whether, to 'respond'. As research into school leadership dilemmas in Sweden has shown (Norberg & Johannson, 2007), one common issue is the conflict between a strong values oriented profession and personal values of individuals; there exists a view that educational leadership is predominantly a values-based activity (Walker & Shakotko, 1999). Bell (1999) made reference to *role conflict* when describing the dilemma faced by school leaders in facing up to introducing business methods that conflicted with their professional ethics as educators.

Of course, teachers were also not happy with the marketization reforms, and that complicated the task of school leadership even more, especially in terms of delegating tasks and reducing the overload for the principal. As noted by Oplatka et al. (2002a, p. 179): teachers 'may be called upon to take their share of responsibility over their school's marketing activities' and 'may be expected to assume a marketing perspective in all of their professional life'. However, it was also discovered (Oplatka et al., 2002a, p. 191) that 'marketing the school is perceived to be one of the factors leading to the increased workload of teachers because of the time required to prepare events and publicity' and that this was 'another source of stress, which may result in increased teacher turnover'. At the same time heads were 'encouraged to stimulate the staff' (Oplatka et al., 2002a, p. 194) to see the school as an organization that had to market itself. In this management environment, school leaders faced a loss of power and identity (autonomy), coupled with a negative approach within the school community to collaboration and collegiality (Wildy & Punch, 1997). They also faced the dilemma of whether to involve teachers, not only because of hostility but also the fear of increasing teacher workload and turnover.

The need for marketing the school further complicated the autonomy dilemma. My own research into marketing and public relations activity in international schools (Bunnell, 2005a, 2005b, 2005c) showed that many school leaders like to show parents around the school and do not always trust others to do it. Moore, George, and Halpin (2002), in a study of eight schools, showed that heads often revert to a 'Taylorist' management style, masked beneath a veneer of collegiality. Chapman (2003) showed that the head often adopted a coercive style of leadership when trying to take the school forward. Hatcher (2005), in asking why principals do this, answered it is because sharing leadership is *risky*. At the same time, Glennys, Lewis, and White (1996) reported that principalship brings with it 'loneliness', and Chaplain's (2001) report among primary principals showed the lowest level of satisfaction was with the level of social support. The *autonomy* dilemma is itself complex: the job of school leader is lonely and stressful but sharing tasks is risky. This is especially the case with marketing the school when the tasks are important to the organization and the activity is politically sensitive.

A further complication is that much RM activity done by school principals is likely done because they *like* to do it and it makes them feel *good*. This makes it difficult to delegate, or distribute, and greatly complicates the *autonomy* dilemma. Heads must also engage in 'emotional management' (Jenkins & Conley, 2007). The sense of challenge and self-advancement seems to be central to the concept of 'self-renewal' (Hudson, 1991). Oplatka et al. (2002b, p. 421) formulated four hypotheses with regard to the effects of marketing the school. It was suggested that 'The features of marketization may enhance head's level of job burnout' and that it 'may increase the levels of occupational stress in headship, through the stimulation of contextual and organisational stressors'. However, two hypotheses exist for a positive interaction: marketization 'may promote the professional growth of school heads' and 'may evoke a sense of self-renewal among school heads'.

The *autonomy* dilemma obviously occurs in relation to shared or distributed leadership, an emergent theme in school leadership literature. School principals face doing a number of demanding roles, and these have increased over time. The *nature* of school leadership has changed over recent years and has become noticeably more demanding and more stressful in some countries, putting pressure on school leaders to face the *autonomy* dilemma. The study by Jones (1999b, p. 491) revealed that: 'In marketing their school heads reported spending an increasing amount of time talking to prospective parents and showing them around the school'. At the same time, this study revealed high levels of stress; 'there was evidence that many of the heads were finding it difficult to cope' (Jones, 1999b, p. 491).

This issue presents a strong argument for distributing leadership activity and responsibility (Gronn, 2000). The school organization has been identified as a key source of stress and poor job satisfaction for heads (e.g. Chaplain, 2001), leading to calls for the tasks to be distributed more broadly. Distributed leadership has been viewed as perhaps offering a 'survival strategy' for overloaded principals (Supovitz, 2000), and a means of spreading the burden of school leadership. Some commentators (e.g. Harris & Chapman, 2002) have called for a re-conceptualization of leadership as practiced in schools. Leadership is increasingly viewed as a diffuse activity involving a number of key agents, including teachers.

Analysis now questions the focus of headship as the preserve of a sole post-holder (Storey, 2004), suggesting that school leadership in practice cannot be understood by studying the practice of individuals, and should instead be seen as a distributed and systematic process (Lumby, 2003). Although the topic has never been directly applied to educational marketing it greatly complicates the *autonomy* dilemma of leadership.

The Efficiency Dilemma

The autonomy dilemma can be seen to create a situation where school leaders are reluctant to delegate activity. The *efficiency* dilemma occurs in relation to duplicated or wasteful distribution and is clearly inter-related. It clearly might be more efficient to delegate the task of showing parents around the school to others, allowing the school leader to concentrate on other matters. Efficiency in general describes the extent to which *time* or *effort* is well used for the intended task or purpose. School leaders (i.e. headteachers) are probably rarely now teachers as well yet 'managing time' is still a major leadership dilemma (Watts & Castle, 1993).

There is another way of viewing *inefficiency* in a schooling context; seeing leadership as leading to complication and ineffectiveness. Delegating marketing tasks to teachers who are hostile to the activity may, for example, be a negative move. A major paradigm shift over the past decade has been the movement away from viewing leadership as merely a 'positive' and 'constructive' activity, towards seeing it as having a 'dark' and 'destructive' side. School leaders can do harm, either intentionally or unintentionally, as well as do good (Chater, 2005). Neider and Schriesheim (2010) point out that studies on management and leadership tend to ignore negative ('dark-side') aspects of workplace behaviour even though it greatly affects individuals and can be detrimental to the effective operating of organizations. The normally romantic and positivist view of leadership has been attacked from several angles (e.g. Schyns & Hansbrough, 2010) with authors offering discussion about delicate and rarely openly-confronted topics such as narcissistic leadership, toxic leadership, unethical leadership, abusive leadership and other 'destructive leadership' forces within the organization.

This complicates the *efficiency* dilemma of leadership; school leaders face risks in involving others and relying on others since they can inadvertently provide opportunities for destruction. Oplatka et al. (2002a, p. 190) had found that several teachers in their study 'declared that they participated in marketing events because we are asked to by the senior management'. This sort of situation is seemingly a ripe one for destructive leadership to occur. One framework (Padilla, Hogan, & Kaiser, 2007) identifies destructive leadership as entailing the negative consequences resulting from a confluence of destructive leaders, susceptible followers, and conducive environments; the 'toxic triangle'. This framework shows that destructive leadership involves more than mere personality. It operates within a complex environment where the characteristics of school leaders, their followers and the situation of the organization combine to create the conditions for 'toxic' leadership, a sort of 'perfect storm'.

The Accountability Dilemma

The above two dilemmas can be seen to create a situation where a school leader is reluctant to delegate, and might inadvertently create a destructive environment. This poses a major accountability dilemma. Oplatka and Hemsley-Brown's (2004) review of the research field concerning the operational paradigm of marketing the school revealed that, in practice, it is in the main a principal's task, and is viewed by teachers as such. This seems logical in a way – teachers want and expect to *teach* (as probably do many principals). But, this goes against the grain in terms of literature, which often asserts that marketing the school ought to involve more than one person. Kotler and Fox (1985), in their seminal book, argued no one person in a school can be expected to conduct the entire range of activity. What they were expressing, of course, is the view that marketing should be considered as not an activity but a *concept*, even a philosophy, placing the customer at the centre. This is the essence of the RM philosophy; as everybody in a school has contact with the customers, everyone should see themselves as involved with marketing.

However, the *accountability* dilemma obviously occurs in terms of the headteacher involving others who cannot be held accountable, whilst delegating tasks may undermine the responsibility of the head. The school leader is ultimately accountable for parents choosing the school hence perhaps they *should* show them around the school. Some writers (e.g. Murphy, 1994) identify this third dilemma as the major one concerning schools in adopting policy reform and restructuring. School leaders *feel* responsible and in the main they probably *are*. The complication within a marketing framework is 'accountable to whom' (i.e. the taxpayer, the electorate, the government, the governors, the local community, the children, the parents)? Who ultimately is the school 'serving'?

Marketing the school complicates this dilemma immensely. The parents and children have become the main 'consumers' and 'customers' yet there is scope for arguing that a school has a much broader range of accountability, both professionally and socially (as articulated by Foskett, 1998, p. 199). The mission statements of many schools make reference to the creating of 'future leaders' and 'global citizens'. The International Baccalaureate (with its four sets of programmes serving 3,200 schools in 140 countries, in November 2011) has a mission to 'facilitate intercultural understanding' and 'global peace'. In this context, an 'IB World School' is accountable to the wider civil society; serving 'society' is as much a mission of many schools as serving the 'consumer' is. School leaders therefore have to balance the needs of the school mission (and society's needs) and the school's stakeholders. In this context, a school (as a global public good) is very different from a shop – the customer base is much broader and more diffuse.

The adoption of marketing strategies in schools involved a significant cultural change and posed a number of significant problems for school administrators in general (Michael, 1990) such as harmonizing the need to implement government policy (external pressures) with the mission statement and values of the school (internal pressures). Begley's (2005) research showed that accountability to the 'system' and accountability to 'others' was a major ethical dilemma concern for school leaders. Another interesting perspective (Stokes, 1997) is the argument that the school leader was presented with the dilemma of accepting *short-term* policy reform (i.e. accepting radical policy initiatives from a government that may not get re-elected) but which might compromise the *long-term* integrity of the school. Wildy and Louden (2000) contended that when faced with these dilemmas, headteachers tended to resort (revert) to 'strong leadership', that is little sharing of information and responsibility, and taking personal control over decision-making. This further complicates the autonomy dilemma.

A major complication is that many of the relationships that a school needs to make and continue are closely associated as leadership tasks. There are *limits* as to how far they can be distributed or delegated. Take, for instance, contact with the local press, one of the 38 tasks (Wanzare & Da Costa, 2001) assigned to headship. This is a relationship that, in the main, requires action by the principal. Firstly, the local press probably expects the principal to participate. Secondly, making contact with the local press is something they would feel uncomfortable in delegating. Here the *accountability* dilemma is coupled with a form of *expectations* dilemma. Building a relationship with the local press is something that a principal is expected to do whilst *official* comment from the school is something that they probably have responsibility for leading? Another case in point might be local community relations. If the mayor invites the school to attend a civic function it is probably expected that the *principal* should attend. It is not really sufficient to proxy the situation, certainly not without harming the relationship. At the same time press relations and local community relations add to role stress and therefore create an autonomy dilemma.

TAKING THE ISSUES FORWARD

This brings us to a point where we can reflect on the discussion in this chapter. The main focus of this chapter has been on research from almost a decade ago which in retrospect can now be noted as having been seminal (e.g. Foskett, 1998; Oplatka & Hemsley-Brown, 2004; Oplatka et al., 2002a). In some respects, this literature paints a good picture of where the field currently 'stands'. This chapter has aimed to 'revisit' this literature to explore the issue of school leadership dilemmas. There is much in this chapter that needs further research and investigation. The topic of destructive leadership is a seemingly novel one as is the 'toxic triangle': To what extent do marketing dilemmas and tensions build this 'conducive environment'? There still seems a need for further research into the views and attitudes of teachers (and heads) in schools towards marketing. Do they still regard it as an 'alien' activity to be treated with hostility and mistrust? Foskett (1998) had identified by the late-1990s a post-marketization phase (one of pragmatic acceptance) appearing towards marketing the school, but to what extent did this ingrain itself within schools and educators? Did a further phase emerge? How has the marketing culture developed in schools?

To give an idea of how some of the dilemma issues can be 'taken forward', it is worth considering that little attention has been made to how marketing the school has affected leaders in a gender specific way, although there is now evidence to suggest that females may be more 'put off' by the growth of marketization activity (a masculine leadership role?). One recent study (Oplatka & Tamir, 2009) tracing the career stories of 25 Israeli female deputy-principals who explicitly do not aspire to be a principal revealed that they construct a clear and sharp distinction between the two roles, viewing principalship as being more stressful, formal and essentially administrative-oriented. There is scope within the context of this study to further examine how the accountability dilemma in particular is affecting (potential and female) school principals. Phillips, Sen, and McNamee (2008), researching among schools in southern England have found that female school heads were more stressed than their male counterparts, although they also assert there is little current research into stress among school principals, and the findings of many existing studies are outdated.

It is worth considering other relatively recent findings. The role of teachers in marketing the school has been found to be an important one; Cambra-Fierro & Cambra-Berdún (2008), researching in a Spanish context, concluded that teachers in a school can be viewed as 'part-time marketers'. However, other recent studies have found that the school administration still mainly manage marketing activity, whilst there is much emphasis now seemingly placed on school image. This might logically be seen as a by-product of modern reproduction techniques now available in many schools, plus the growth in importance of the website. Khan and Qureshi's (2010) study of marketing activity among 16 private schools in Pakistan found that none had a 'marketing section' as such; in 6 schools all the school marketing activities were operated by the principal while in the other 10 schools there were other administrators in-charge of the marketing activities. The main conclusion drawn from this study is that school appearance is an important factor in students' choosing the school and that school decoration is important. Much of this promotional activity in Pakistani private schools is seemingly done by the principal. This implies that the *efficiency* dilemma can be further investigated in terms of overload, and the *autonomy* dilemma can be viewed in terms of delegation; does (should) the school leader have to decorate the school? Alternatively viewed, who is *accountable* for decorating the school?

We now know more about marketing activity in school contexts beyond an Anglo-American setting, for example Li and Hung's (2009) study of 60 primary schools in Taiwan also found that school image was being used to promote parental loyalty and positive word-of-mouth. Lubienski's (2007) study of promotional materials has found that images (rather than textual information) dominate school marketing strategies in urban areas of the United States where competition amongst schools is strongest. This literature shows the potential for further research into leadership dilemmas concerning marketing the school, and from practice in countries not previously explored.

Wildy (1999) offered an example of future research that might be useful, when she interviewed school leaders and presented a narrative account. This was seen as a development of Eisner's (1985) concept of 'connoisseurship': knowing 'how to look, to see and to appreciate'. Wildy's interviews were presented through the voice of the principal, allowing for the comments to not be reinterpreted by the interviewer. More semi-structured in-depth interviews would also be useful as they would enable the researcher to both understand the experience of school leaders and the meanings they attach to their experiences (Siedman, 1991); then we could get a better understanding of dilemma phenomena from the point of view of the persons involved (Patton, 1991). More research into the real-time marketing activity of school leaders would give us a better idea of how they act on their reality (as articulated by Jones, 1999b).

To conclude, the field currently (still) stands at a point where more research, especially ethnological observation and discussion, is required of what actually happened and continues to happen? It might be more appropriate if this could come from school-based practitioners rather than research invitees. More 'shop-floor' type research along the lines of the Northwark Park School reports and observations (Gewirtz, Ball, & Bowe, 1993) would be useful. The 'open house' marketing activity has been shown to be a particularly fruitful source of observation (e.g. Maguire et al., 2001; Oplatka, 2007). It has been recently re-asserted (Shapiro and Stefkovich, 2011, p. xii) that there is both a 'burgeoning' interest in ethical dilemmas of leadership plus a realization that case study research is useful for exploring administration problems.

This leads to a major criticism to be drawn about this field of educational research – it remains heavily reliant on research and analysis from over a decade ago. The article by Oplatka and Hemsley-Brown (2004) reviewing the current situation was seemingly in many ways a 'signing off' chapter. This review painted a fairly damning picture of the topic and concluded (p. 390) that research 'is extremely limited in its quantity, methodology, location, aims and topics'. The research undergone had involved a predominantly British focus, and had been more intent on discovering how and why schools undertook marketing rather than discovering the effects and implications of such practice. Much of the research was 'speculative' and lacking in large-scale systematic analysis. For example, the study into teachers' views on marketing by Oplatka et al. (2002a) had involved just a dozen secondary school educators in southern England (Hampshire) whilst Foskett's (1998) survey of the marketing culture had involved eight schools in three areas in England. In short, we are still reliant on small-scale qualitative accounts of localized activity and attitude. A similar conclusion had been earlier drawn (in an Australian context) from a literature review by Kenway, Bigum, and Fitzclarence (1993) who had also highlighted the inadequacy of current conceptual frameworks for categorizing and understanding marketing developments in schools. It seems time to revisit some of this research and leadership dilemma seems one way forward.

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SECTION TWO
EDUCATIONAL MARKETING IN DIVERSE NATIONAL ARENAS

SCHOOL MARKETING IN THE UNITED STATES: DEMOGRAPHIC REPRESENTATIONS AND DILEMMAS FOR EDUCATIONAL LEADERS

Christopher Lubienski, Matthew Linick and J. G. York

ABSTRACT

School leaders in the United States are increasingly embracing marketing practices in order to promote their schools in more competitive conditions. Yet while policymakers are actively encouraging such conditions, little attention has been paid to the equity effects of these practices. Advancing from the insight that marketing materials can illuminate some of the underlying incentive structures to which schools must respond, this study examines patterns in the marketing materials in two metropolitan areas with the most competitive education markets in the United States. Web-based materials for all schools in Washington, DC and post-Katrina New Orleans were analyzed, noting how individual schools and different types of schools represent their racial makeup. By analyzing these

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differences in traditional-public, charter, and private schools, we were able to see emerging patterns that suggest the role of market forces in school organizational behavior, with cautionary lessons for how different types of students are valued.

Even as the United States has moved increasingly toward market mechanisms for organizing schools over the last two decades, little attention has been paid to the issue of marketing in the United States, even though that practice has become more popular with school leaders. Yet at the same time, school marketing is already well established in many other countries, as is the study of this phenomenon (Foskett, 1998, 2002; Hesketh & Knight, 1998; Lubienski, 2011; Oplatka, 2004; Oplatka & Hemsley-Brown, 2004; Oplatka, Hemsley-Brown, & Foskett, 2002). While schools are being encouraged to act in more entrepreneurial ways to deal with consumer choice and competition with other schools in the United States – adopting business-style practices to encourage innovation and customer orientation, for instance – there are remarkably few efforts from policy or research circles to consider how school leaders actively seek to position their schools in the emerging educational marketplace. Although some writers in the United States have provided some insights in the form of "how-to" manuals (e.g., Kowalski, 2000), there are virtually no scholarly inquiries available to shine an analytical light on this issue for researchers, policymakers, and school leaders. Yet this lack of attention has serious implications for both the equity effects and the efficacy of policies intended to create better educational opportunities for children through school choice and competition.

In fact, multiple national and local policies in the last two decades have created more market-like environments for US schools, particularly in some larger metropolitan areas. Policy initiatives such as charter schools, voucher programs, and open-enrollment plans give parents more choices while often giving schools greater levels of autonomy to respond to consumer preferences in attracting and satisfying customers. These ideas are motivated largely by a neoliberal ideology that sees markets as better able to deal with the social and institutional problems that have often confounded state-administered agencies. In the United States there are now over 5,000 charter schools educating some 1.5 million children in over 40 states, for instance – autonomous schools that must attract choosers to stay in business; some 50% of parents say they can choose other public school options, putting the onus on their schools to respond to their preferences (Lubienski & Weitzel, 2010). Thus, school leaders are suddenly finding themselves confronted with the need to sense parental preferences, define their own school's role in the emerging school market, and convey to current and prospective students the potential contribution of the school to their education. However, this presents conflicting incentives for school leaders. On the one hand, schools are generally held up to the American ideal of equitable access. On the other hand, leaders may have reason to attract better students in order to improve their schools' market position.

This chapter takes a critical perspective on the issue of school marketing, establishing a conceptual framework for understanding how schools respond to market incentives by engaging the market through promotional activities in the United States, and then in offering an empirical analysis of school marketing materials in two major educational "markets." The next section offers a conceptual overview of the tensions facing school leaders in the new American education market. It examines the incentive structures that inform organizational behavior in the competitive education quasi-market, particularly in light of the chronic American tendency toward racial and socioeconomic segregation in residences and schools, and the potential of choice to bypass the de facto barriers of residential sorting as well as school boundaries. The issue, then, is how schools are responding to these incentives in opening up opportunities or furthering segregation. We argue that marketing efforts by schools offer unique and useful evidence on how schools are responding to these incentives. We ask: *What patterns are evident in marketing that indicate how different types of schools are using marketing to promote opportunity or enhance market position?*

The analysis then presents a short empirical exercise in which we analyze the marketing materials of all schools in two major local educational markets. Following up on a groundbreaking study of parental preferences in Washington, DC, which found parents pursue information on the racial composition of a school more than its academic performance, we examine whether different types of schools in DC are marketing to those preferences – essentially playing to the idea of affinity grouping by race. Similarly, we examine the local market in post-Katrina New Orleans, where policymakers moved toward what was effectively a universal choice system, and granted schools considerable autonomy in engaging the new educational market. In these two cases, we analyze school marketing materials, testing for patterns in how they are over-representing or under-representing different types of students at different schools. Our analysis considers the issue of student representation and valuation, weighing the possibility that the emerging competitive climate, intentionally fostered by some policymakers, may have unintended consequences on some types of schools. The analyses suggest some emerging patterns where specific types of students are more highly valued by schools, while other students may be effectively discouraged from applying to certain options. The concluding discussion considers the implications of these patterns for policy and school leaders.

EQUITY AND INCENTIVES IN AMERICAN EDUCATION

Since the advent of the modern school choice movement, with its impetus in the equity-oriented policy discussions of the 1960s and 1970s, there has been an accompanying concern about unleashed consumer demand leading to increased segregation by race and social class across American schools (e.g., Moore & Davenport, 1990). In fact, even the intellectual author of the modern school choice movement, Milton Friedman, acknowledged this potential problem in his essay outlining a voucher system (Friedman, 1955). Published in the wake of the 1954 *Brown v. Board of Education* decision, Friedman recognized the possibility that some White segregationists might embrace his proposal simply as a way to avoid court-ordered integration efforts in the public schools. And indeed, efforts by Southern governors to close public school systems rather than allow for desegregation, along with the rise of "White Flight Academies" across the South marketing themselves to segregationists affirmed this possibility.

On the other hand, choice offers a unique potential for policymakers to break down entrenched patterns of segregation that are based largely on racialized residential distributions in the United States. Since school enrollment and catchment zones often reflect political boundaries such as municipal borders, or cultural divisions (such as the "other side of the tracks"), public school enrollment is typically defined by one's geographic location in an attendance zone created by a local school district. Choice plans, such as open-enrollment schemes, allow families to choose across school zones within participating jurisdictions. As a state-level creation, charters make any such zones largely irrelevant, so that students can attend a charter school of their choice, forcing charter schools to promote themselves to attract families. Voucher programs go even further, affording families the opportunity not only to cross school zone boundaries, but public and private school sectors. In all these cases, place of residence is replaced by interest and initiative as the deciding factors in school placements, and schools are given the incentive to attract more students in order to improve their bottom line. Because of this theoretical potential to open up options for students previously consigned to failing districts, groups such as the Black Alliance for Educational Opportunity and Hispanic CREO have emerged to advocate for greater choice, arguing that school choice is a civil rights issue (Holt, 1999; King, 1997, 2001; Will, 2003).[1] At the same time, the emergence of competitive forces in American education ensures that marketing is becoming an important phenomenon for successful school management (Lubienski, 2005a).

In view of the possibility that choice and competition can give schools the incentive to market themselves in ways that could either exacerbate or ameliorate social segregation, the question of attendance patterns in choice plans deserves special consideration. Going back to the common school era of the 19th century, Americans have embraced the social goal of educating children from diverse backgrounds together in common. While often failing at this objective, the values were highlighted by the legal efforts of the civil rights movement and the subsequent series of desegregation cases that sought to guarantee equity of educational opportunity, first through access, and then through exposure to students of different races. Moreover, integration is not only an issue of how to achieve the broad social values of fairness and tolerance. Scholars have pointed to important academic implications of racial and social integration as well (Kahlenberg, 2006; Orfield, Frankenberg, & Garces, 2008). Sitting next to students of different backgrounds can produce social understanding, tolerance, and cohesion, as well as higher academic aspirations, a richer academic environment, greater academic performance, and more equitable academic outcomes.

However, despite their theoretical potential to achieve these goals by essentially eradicating catchment zones, choice programs have not been shown to be making great strides in promoting more racially or socioeconomically integrated learning environments. While the research on voucher programs has tended to focus more on academic outcomes rather than enrollment patterns, there is some evidence on admissions patterns in the private school sector as a whole, a sector that appears to enroll fewer minority students, fewer special needs students, and students from more affluent families compared with the public school population (C. Lubienski & Lubienski, 2006; S. T. Lubienski & Lubienski, 2006). Controlled choice schemes (a form of open-enrollment) are administered primarily around diversity goals, so that there is little question about their integrative effects. However, charter schools, publicly funded but privately run schools, have attracted much attention not only for their academic outcomes but for their role in exacerbating or ameliorating racial and social sorting in American education. The question then, as we show below, is how such schools utilize marketing strategies that impact enrollment patterns.

Demand-Side Issues

Research on charter schools has continuously raised some concerns about how they may be serving as vehicles for further segregation in public education (Eckes, 2010). Frankenberg and Lee (2003) examined school enrollment data across states, noting that charter schools tend to serve a larger share of African American students than other public schools, and White students in charter schools are relatively racially isolated. Taking up this line of inquiry, Rapp and Eckes (2007) examined 32 states where charters have a significant presence, finding that charters were more segregated, often due to the fact that minority students enrolled in charter schools at higher rates. Most recently, Frankenberg and Siegel-Hawley (2009) found charter schools are more segregated than public schools, and are outpacing public schools in their rate of (re-)segregation. Thus, the weight of this research indicates that the proliferation of charter school options may be leading to greater segregation (Lubienski & Weitzel, 2009; Renzulli & Roscigno, 2007). Certainly, at least part of the explanation for these patterns is that there is a fair degree of self-sorting occurring. For instance, in an important study of school search patterns in Washington, DC, Schneider and Buckley (2002) tracked parents' revealed preferences as indicated through web searches, in light of their stated preferences for school quality. Although parents claimed to place less weight on racial demographics at schools, web searches often first focused on the racial composition of schools.

Looking more recently at Arizona, Garcia (2008) followed individual student enrollment patterns as families selected schools. At the elementary level, students often left more integrated public schools for more segregated charter schools (Garcia, McIlroy, & Barber, 2008). Garcia ascribes these patterns to white flight and minority self-sorting in the early grades, and sorting by ability (Garcia, 2010). Similarly, Bifulco and Ladd (2006) found White students enrolling in charter schools where the student populations mirror their own racial characteristics. Furthermore, they noted that African American students often leave demonstrably superior public schools for charter schools with more African American students.

Supply-Side Issues

While there is some evidence of white flight and self-segregation, little attention has been paid to the role that schools may play in sorting students, and almost nothing is known about the mechanisms by which this could happen. This is an odd omission considering that schools in increasingly competitive climates are often given the incentives and institutional capacity to shape admissions as individual institutions and thus in the aggregate (Fiske & Ladd, 2000; Lubienski, Gulosino, & Weitzel, 2009). Yet there does appear to be at least some evidence of institutional efforts to impose organizational policies that have implications for student sorting. For instance, a study of district policies in response to competitive pressures in metropolitan Detroit found that many inner-rim suburban districts were foregoing substantial financial incentives to accept students from the failing central urban district (Lubienski, 2005b). That is, some districts appear to prefer to maintain their market position by serving a Whiter and more affluent clientele rather than fill increasingly empty schools with disadvantaged minority students – suggesting that the per-pupil funding those students would bring was not enough to compensate for social costs they might represent. This also may be occurring through the rise of school marketing practices, which may target certain populations while neglecting others (Lubienski, 2005a, 2007a, 2007b).

Indeed, school policies may have an important impact on enrollment patterns. For instance, although it is possible that students with less severe disabilities enroll in charters while higher need students remain in public schools to take advantage of better services, some charter schools may exclude students with behavioral problems, which require parental contracts, or otherwise encourage attrition of more difficult-to-educate or higher-cost students (Becker, Nakagawa, & Corwin, 1997; Estes, 2004; Hehir, 2010; Lubienski et al., 2009; Wolf, 2011). Similarly, since proximity is an important factor for parents choosing schools (Kleitz, Weiher, Tedin, & Matland, 2000; Schneider & Buckley, 2002; Witte, 2000), *where* schools decide to locate (a real factor with new schools such as charters) is likely to have a significant impact on enrollment and access, and some evidence on school location patterns indicates that schools are responding to competitive incentives to avoid certain students in overall locational decisions (Lubienski & Gulosino, 2007; Lubienski et al., 2009). Again, this suggests that schools do not necessarily view all students as equally valued in the education market, despite equalized per-pupil funding.

In view of this evidence of organizational behaviors around access and enrollment patterns, there is reason to suspect the possibility that schools recognize incentives to appeal to some types of students more than others. That is, our logic framework suggests that, as choice options such as charter schools and vouchers for private schools proliferate, different types of schools may be feeling increased competitive pressures. But the range of competitive responses available to schools may be rather limited. Most schools cannot engage in price competition (although some may impose additional costs to discourage some potential consumers). Innovations, while quite fashionable in education policy discourse, are famously difficult to develop, implement and sustain in education (Lubienski, 2003). Almost by default, marketing holds much promise for schools charged with attracting and retaining their (previously captive) clientele. Indeed, in view of the overwhelming intransigence of background factors (and the relatively weak influence of organizational effects), it may be easier for schools to attract, rather than produce, good students as schools seek to enhance their position in local education market hierarchies. Even public schools that are technically prohibited from selecting their students and are required to use randomized admissions procedures when oversubscribed may recognize incentives to shape their enrollment by shaping the pool of applicants from which they must randomly select.

Thus, schools might appeal to certain "upscale" segments of the market. Even when students generally bring in the same per-pupil amount, schools might prefer to attract students representing lower costs and lower risk, and associated with higher market position. And such appeals may be evident in marketing materials. After describing the organizational incentives faced by school leaders in the next section, we then test this proposition.

INCENTIVES AND ORGANIZATIONAL BEHAVIOR

In recent years, the idea that schools could be improved by being subjected to external incentives in competitive climates has become quite popular in research and policymaking circles. In a logic that some have been calling "incentivism" (e.g., Greene et al., 2008; Lubienski, Scott, & DeBray, 2011; Stern, 2008), or "market theory" (Davies, Quirke, & Aurini, 2006; Smith, 2003; Walberg, 2000), market-oriented reforms such as choice and competition are held up as the solution for the institutional ills of public schools. Since public administration of schools shields educational organizations from accountability to competitive market forces, incentivists argue that creating competitive environments for schools will force them to be responsive to consumer (and policy) preferences through practices such as marketing. That is, if school funding is made portable through a choice system, schools will realize an incentive to find ways of attracting and retaining families, along with the per-pupil funding they bring.

A key element of this logic is that organizations must be relatively autonomous so that they can best sense and respond to incentives in ways that work for that given organization. Notably, incentivist approaches differ from other reform strategies in that, rather than dictating specific curricular or instructional practices, they simply establish incentive structures to encourage innovation and improvement. These general goals set out by policymakers can be built into the incentives. Indeed, some incentivists hold that most any policy objective can be translated into incentive structures that will encourage schools – more effectively than will bureaucratic administration – to adopt certain organizational behaviors, be they in curriculum and instruction, admissions, or administration (Moe, 2008). Thus, if policymakers seek to remedy school segregation, for instance, rather than dictating attendance or bussing policies, incentives can be established that encourage schools to admit from across segregated school catchment boundaries, or reward them for accepting students underserved in their neighboring school (Rothstein, 2001).

While the incentivist approach is appealing in its potential for rewarding local organizations to innovate in finding ways of meeting policy objectives, the laissez-faire approach to setting specific strategies raises the possibility of unintended consequences, as organizations may sense and respond to incentives in ways not anticipated by policymakers. This possibility has been highlighted in theoretical and empirical work by economists studying the behavior of nonprofit organizations in increasingly competitive market environments. While much research examines for-profit firms and state-run entities, this literature on nonprofits offers an important model to consider in examining increasingly independent public schools. Whereas other models are driven by profit-seeking motives or bureaucratic fiat, nonprofits are often established to pursue a social mission.

However, with the introduction and increase in competition (often due to intentional public policies) in some mixed-model sectors, there are questions as to the impact of new external incentives on nonprofit organizations. Thus, for example, with the emergence of for-profit hospitals or nursing homes in fields traditionally dominated by religious, community, and philanthropic impulses, the question arises as to how the organizational strategies of nonprofits might change as they respond to competitive incentives in areas such as access. For instance, with nonprofit hospitals, higher geographic concentrations of for-profit hospitals in the vicinity is then associated with greater levels of entrepreneurial behaviors on the part of nonprofits (Duggan, 2000). In such instances, nonprofit entities often adopt profit-maximizing practices in order to support their nonprofit missions (Sinitsyn & Weisbrod, 2008). Thus, since clientele can inform an organization's position in the market hierarchy, an organization may recognize an incentive to pursue some groups of patrons while excluding others.

This is an important consideration as policymakers seek a more competitive climate for educational organizations that are largely autonomous, and traditionally community-based, nonprofit entities. Yet admission/attendance patterns in the education sector – an area with chronic patterns of segregation – also raise some additional concerns with the rise of market models. As noted, a student's social characteristics may come to represent his or her "value" in the education market, with some social groups associated with a higher market position for the organizations they patronize (Ball & Gewirtz, 1997). This, then, could create perverse incentives for schools to avoid serving certain types of students, while pursuing more "desirable" types. Of course, many public schools are explicitly prohibited from choosing which students they may serve, and must introduce some type of randomized system such as a lottery when applications exceed places. However, even then, schools have the incentive to shape their pool of those applying through efforts such as marketing, in order to stack the deck in the organization's favor – what we might call "applicant pool shaping" (Lubienski, 2005a).

Thus, if market theory is accurate, we might expect to see schools respond to the incentive of portable per-pupil funding by reaching out to populations underserved in their assigned schools. On the other hand, some organizational responses might entail appealing to certain "upscale" segments of the market, thereby constraining access. Even when students generally bring in the same per-pupil amount, schools might prefer to attract students representing lower costs and lower risk, and associated with higher market position. Below, we examine these possibilities in view of the evidence, and discuss the implications in the concluding discussion.

SCHOOL CHOICE IN THE DISTRICT OF COLUMBIA AND NEW ORLEANS, LOUISIANA

To study this issue, we considered the promotional activities of all schools in two of the most competitive education markets in the United States: the

District of Columbia and New Orleans. Both cities have been the sites of many prominent choice reforms in recent years, and both cities are home to traditional public schools, charter schools, private schools, and a voucher system. In fact, these two cities occupy the two largest proportional charter sectors of any city in the nation (National Alliance for Public Charter Schools, 2009). Thus, Washington, DC and New Orleans offer fertile cases through which to examine the organizational behaviors of schools as they seek ways of positioning themselves in the emerging educational marketplace.

School Choice in the District of Columbia

To study this issue, we considered the promotional activities of all schools in the District of Columbia, which has been the site of a number of prominent choice reforms in recent years. Washington is a diverse yet rather segregated city in terms of race and socioeconomic status, by both residence and institutions. While almost 70% of the school-aged population is African American, for instance, African Americans constitute just over one-third of the private school population, over 80% of the public school population, and almost 90% of the charter school population, according to data from the US Census Bureau and the National Center for Education Statistics.[2]

In view of a public school district that has been accused of being the most inefficient and ineffective in the nation, policymakers have launched a number of reforms in Washington. Charter schools were introduced to the city in 1996 and now have the second largest market share in the nation (after New Orleans), making up 36% of public school enrollment (National Alliance for Public Charter Schools, 2009). Reformers expected that these options would provide families with alternatives to failing public schools, although charters may also be appealing to private school families, especially as some private schools close or convert to charter status due to declining enrollments (see, e.g., Labbé, 2007). In 2004, Congress implemented a publicly funded voucher program, the DC Opportunity Scholarship Program, which provided a means-test subsidy of up to $7,500 to attend private schools in the District of Columbia – the majority of which accept the voucher.

Schools in DC exhibit rather stark patterns of segregation. For instance, on average, a typical White student enrolls in a public school that is 56.4% minority, in a private school that is 27% minority, or in a charter school that is 84.8% minority, and segregation in DC charter schools is worsening (Lee & Lubienski, 2011).

School Choice in New Orleans

For this project, we turned to New Orleans as an emerging and dynamic urban educational marketplace that suits the study of choice and student admissions patterns. The institutional overhaul that began in the city before Katrina was accelerated dramatically following the devastation caused by the 2005 hurricane. Since that time, policymakers have promoted charter schools in the city under the incentivist logic that increasing options would create the competitive forces required for systemic improvements in the chronically underperforming city schools (Friedman, 2005; Klein, 2007; Richmond, 2007) – to the extent that they now occupy the largest proportional charter sector of any city in the nation (National Alliance for Public Charter Schools, 2009; Ziebarth, 2006).

Furthermore, in accelerating the state takeover of failing public schools initiated before 2005 with the Recovery School District (RSD), the hurricane allowed state lawmakers the opportunity to authorize the takeover of all of the remaining public schools, which can admit students from outside their assigned areas, so that essentially only the high-performing public schools are still run by the public school district (Lubienski et al., 2009). Both the RSD and the public school district also grant charters within the same geographic area as the state. Thus, these two organizations each run or authorize public[3] and charter schools, and the State Board of Education also authorizes charter schools in New Orleans. All these options are in addition to a well-established and comprehensive private school system, which further facilitates choice now with the introduction of a voucher program to attend private schools (Simon, 2008). Thus, as a system that is essentially starting anew on a market-orientation, New Orleans offers a fertile case through which to examine the organizational behaviors of schools as they seek ways of positioning themselves in the emerging educational marketplace of proliferating choices.

Marketing practices evident in websites, for example, can suggest how schools – both individually and by type – are or are not seeking out traditionally underserved groups, since they now have the per-pupil incentive. For instance, it may be that traditionally underserved groups such as African American and Hispanic/Latino students are being courted by schools in which they were previously under-represented, and which now see the possibility to expand their market share. On the other hand, it could be that privileged groups or groups associated with academic success, such as White and Asian students, are more highly valued by schools seeking to enhance their position in the local pecking order, while other groups of students might be under-represented in marketing materials as a way of discouraging them from applying.

Moreover, some types of schools may be more or less inclined to engage the emerging quasi-market because of their institutional type. Schools that are more market-driven, for instance, might focus on projecting a more up-market image by using representations commonly associated with academically successful groups. However, inasmuch as all schools in a quasi-market setting are subject to common competitive forces, they might respond to competitive incentives in similar ways (Lubienski et al., 2009; see Sinitsyn & Weisbrod, 2008; Weisbrod, 1998).

DATA AND METHODS

In an effort to explore the use of marketing practices in these two districts, we examined schools' marketing materials to see how they appeal to the broad pool of potential clients that now have access to multiple options. We collected data on all public, private, and charter schools in the primary and secondary levels in Washington, DC (n = 328) and New Orleans (n = 126). School-level data were drawn from the National Center for Education Statistics (NCES), and checked against a range of local sources such as parent guides, webpages, phone, and other directories. We then focused on school websites, designed for public consumption, in order to see how they define and pursue their preferred pools of clients. While websites represent only one manner in which schools engage the public, they are the most widely available means that schools can use to promote themselves, with more schools using the web than any other form of public engagement – thus presenting us with a broad basis for comparing many different schools. Then, school websites were located during the first half of the 2010 school year through web searches, and the website data for each school were analyzed for the number and different racial/ethnic categories of students represented on their main pages.[4] Although not all schools had their own websites, we saw no substantial differences in the student compositions of schools with websites compared to those without. Following the categories established by the NCES, individual student images were classified as Black (African American),[5] Hispanic/Latino, White, or Asian, and we also noted when images suggested that student were multiethnic or when race/ethnicity could not be determined. The classification of student images was rather straightforward, but it was possible that differences could emerge in how individual students could be classified. Therefore, we checked for inter-rater reliability, finding no significant problems.[6]

Next, these data on student representations in the marketing materials were compared to the most recent NCES data on the actual demographic composition of each school. The percentage of all representations of each category of students at a school was compared to the actual enrollment percentage, using a Chi-squared, Goodness of Fit test to check the extent to which the observed frequencies of different students in the websites reflect the actual population as determined by the NCES. In order to understand how patterns might differ between and across school types, the analysis focused on three main school types: public, private, and charter. These data were used to predict the expected frequencies of students in the schools, and then those predicted frequencies were compared to the observed or actual frequencies from the NCES school demographic data, using the following formula:

$$\chi^2 = \sum \frac{(\text{Observed}_i - \text{Expected}_i)^2}{\text{Expected}_i}$$

We used this approach to test the null hypothesis, which asserts that the proportional breakdown of student images portrayed in the marketing materials provide a reasonable reflection of the students that attend those schools. (A p-value of .05 was used to establish the critical value to test the relationships, as this is the commonly accepted level of statistical significance.)

FINDINGS

In general terms, there were many instances of school marketing materials that were not an accurate reflection of the actual demographic of the schools that produced those websites. Of course, this is to be expected to some degree, since, for instance, some schools would feature only a few students on their websites, thereby increasing the likelihood of skewed representations. (However, a few schools featured more White students in their websites than they actually had in the entire schools, indicating that they were using stock marketing photos and thereby promoting an inaccurate image.) The real question was whether there were overall patterns where different types of schools consistently under-represented or over-represented certain types of students *in the same direction*.

Washington, DC

In DC, when comparing the expected (predicted) frequency with the observed (actual) frequency, certain patterns emerge (see Table 1).

In the analysis of public schools in general (including both subgroups), the data showed some degree of disconnect between the representations of students in marketing materials and the actual demographics of DC public schools with marketing materials. Marketing materials for the DC public schools substantially under-represented Hispanic students compared to their actual enrollment by a factor of almost seven to one. Black students and White students had little influence on the overall significance of the Chi-square value. Table 2 disaggregates the data by school subtypes, comparing only frequencies of students in marketing materials to the demographics of schools with websites. The marketing materials for charter schools over-represented white students by a factor of nearly three to one. In addition, charter school marketing material over-estimated Asian and Hispanic enrollment while under-representing Black enrollment; however, none of these misrepresentations was as large as the over-representation of White students. Private school marketing materials under-represented Asian students by a factor of three to one, but was fairly accurate with the representations of other races.

When magnet schools were disaggregated from the general public school dataset, the result is not statistically significant. Therefore, we cannot reject the null hypothesis that magnet school marketing materials accurately represent student demographics; however, the representation of White

Table 1. Predicted and Actual Frequencies, by School Type, in Washington, DC.

	Asian	Black	Hispanic	White
Public (predicted[a])	237	11,064	307	2,358
Public (actual[b])	514	9,081	2,151	2,186
Charter (predicted)	152	10,347	1,777	1,406
Charter (actual)	83	11,998	1,178	505
Private (predicted)	185	3,256	637	7,597
Private (actual)	563	2,720	761	7,516

[a]Predicted from website images, as noted above.
[b]Based on NCES data, as noted above.

Table 2. Predicted and Actual Frequencies, by School Sub-Type, in Washington, DC.

	Asian	Black	Hispanic	White
Public				
Non-magnet (predicted)	208	9,495	319	2,230
Non-magnet (actual)	495	7,514	2,090[a]	2,134
Magnet (predicted)	24	1,498	0	179
Magnet (actual)	19	1,567	61	52[a]
Charter				
DCPS chartered (predicted)	0	1,515	52	10
DCPS chartered (actual)	6	1,790	241[a]	6
Non-DCPS chartered (predicted)	17	8,847	1,009	1,654
Non-DCPS chartered (actual)	77	10,208	937	499[a]
Private				
Voucher private (predicted)	126	3,310	602	5,678
Voucher private (actual)	475[a]	2,412	673	6,124
Non-voucher Private (predicted)	38	403	92	1,349
Non-voucher Private (actual)	88	308	88	1,392

[a]Observation was statistically significant.

students as an independent analysis is significant. Also, when we compare marketing images for magnet schools to the actual demographics in magnet schools with marketing materials, it appears that these magnet schools significantly over-represent their White students.

For charter schools as a group, the marketing materials did not accurately represent the actual demographics of DC charter schools. The data primarily contributing to this result was the over-representation of White students. In general terms, charter school marketing suggested that enrollment of White students was three times higher than it actually is, and over-represented enrollment of Asian students by a factor of two to one, although this latter result is not statistically significant due to the lower enrollment of Asian students in DC charter schools. When DCPS-authorized charter schools are disaggregated from the charter school data, the same result occurs, but the main contributing factor is the over-representation of Hispanic students. This is the only subtype in which Hispanic student over-representation is the major contributing factor. When non-DCPS charter schools are disaggregated from the dataset, the data shows that their marketing materials misrepresent their actual demographics, primarily due to the substantial over-representation of White students in their marketing.

In the analysis of private schools, it first appears that private schools as a whole over-represent Black students in their marketing materials – perhaps in an effort to broaden their appeal to a potential new clientele that can use vouchers to attend these schools. Yet the apparent patterns are not statistically significant. However, when disaggregating the private school data by school subtype, the data showed that private schools that accept vouchers over-represent their African American students, while private schools that reject vouchers are rather accurate in their representations of students. This may suggest that voucher-accepting schools are seeking to broaden their appeal to an African American population that has not traditionally had as much access to private education. On the other hand, inasmuch as there is already a fair degree of segregation in private schools, the fact that non-voucher private schools are using marketing in ways that reflect that segregation suggests that they are seeking to maintain their demographic profiles and possibly their advantageous market position.

New Orleans

Generally, there were many instances of school marketing materials that do not present an accurate reflection of the actual demographic of the New Orleans schools that produced those websites, suggesting the possibility that misrepresentations may reflect intentional strategies to shape enrollment. While this is an interesting point we consider more below, there is also the question of the degree to which there were patterns evident in the data for the different types of schools. Using the Chi-squared to check the degree to which the student demographics represented on school websites match the actual enrollment at those schools, the results were mixed. For overall categories of schools, the New Orleans data tell a similar story about public schools. But there were no statistically significant differences between the proportion of different racial groups observed in school marketing and the actual enrollments for private and charter schools.

However, compared to Washington, DC, in New Orleans this incongruence stems from White students who were over-represented on marketing materials by a factor of almost 7–1. Another difference between New Orleans and DC is that statistically, the marketing materials in charter and private schools more accurately predict the actual racial makeup of the schools. Taken at face value, this suggests that charter and private schools are not using their websites as a marketing strategy to shape their enrollment: either to aim for more "up-market" students, or to seek out more minority students who may have been dissatisfied with the traditionally failing public schools. (Or, as another theoretical possibility: that they are not using marketing to further diversify their school enrollment.)

Yet we may infer that public schools appear to be, on average, using marketing through websites to pursue a more advantaged population – in keeping with the unique up-market position of the few remaining New Orleans public schools in the local market hierarchy (Lubienski et al., 2009).

But perhaps more illuminating is the individual school data, which is obscured in the Chi-squared analysis. There we see substantial and often intriguing variations in how schools represent their student populations in their marketing materials. While there may not be a difference statistically, a closer look shows that there are many schools engaging in misrepresentation. About 1 in 5 charter schools substantially misrepresented the racial makeup of the school, and in private schools it was closer to 2 in 5. For instance, among the public schools, one school in particular dramatically over-represents its White students. This is a nonselective magnet school that enrolls eight White students and 442 African American students, yet four out of ten students pictured on its webpage are White (half the white enrollment of the school, compared to about 1% of the African American students). Although only a single case, such a gross misrepresentation may indicate a desire for this school to occupy a different market position by attracting a different client profile.

Likewise, although most charter schools are, as a group, fairly accurate in their representations of the student demographics in their schools, some were quite misleading. In about one of every five cases, charter school marketing substantially misrepresents the proportion of African American students they enroll, usually under-representing these students. In fact, one international charter school has a student enrollment that is approximately one-half African American children. Most of the pictures it presents are of White students, who make up about one-quarter of the school. It offers no representations of African American students. Again, while some deviation from the actual student composition is to be expected, such a gross misrepresentation may indicate an intentional effort to shape enrollment through image management.

For private schools, approximately two of every five schools misrepresented the proportion of Black students they enroll by a substantial degree. Of the 41 private schools in the study, nine over-represented their Black students, and in all those cases Black students were a minority of the school's enrollment – perhaps indicating a desire to further diversify the school's enrollment, or offer opportunities for minority students. On the other hand, when private schools substantially under-represented their Black students in their marketing, they then over-represented White and Asian students instead. These data suggest three distinct categories of private schools: first, those that seem to be appealing to an African American population that had, up until now, been largely consigned to failing public schools; second, those private schools already serving large proportions of African American students, which are seeking to attract more White students; and third, those largely White institutions that appear to be shunning African American students, perhaps as a reflection of their desire to be associated with a more traditionally exclusive "up-market" demographic. Further investigation is needed to explore how these different subcategories of private schools map onto other distinctions in this category, such as where schools are located, which group runs them, how they define themselves relative to competitors, and whether or not they accept publicly funded voucher students.

When we compare marketing images for magnet schools to the actual demographics in magnet schools with marketing materials, it appears that these magnet schools significantly over-represent their White students. For charter schools as a group, the marketing materials did not accurately represent the actual demographics of DC charter schools. The data primarily contributing to this result was the over-representation of White students. When disaggregating the private school data by school subtype, the data showed that private schools that accept vouchers over-represent their African American students, while private schools that reject vouchers are rather accurate in their representations of students. These differences found after disaggregation of the DC schools by subtype, indicate that further and deeper research into the New Orleans data is needed to understand how the different subtypes match. It is possible that, while overall the charter and private schools' predicted frequencies are not statistically different from the actual frequencies, the subtype frequencies are very different.

DISCUSSION

As policies promoting choice have fueled the competitive forces in American education, school marketing is an increasingly popular practice in the United States, as well as in other market-based democracies. But in examining school marketing, it is important to understand the incentives behind schools' organizational strategies in facilitating access to different populations, and particularly traditionally peripheralized groups. This is an essential step in harnessing or reining in the potential of choice to impact equitable educational opportunities.

Theorists have wondered whether common competitive incentives can have a homogenizing effect across the behavior of different types of organizations – different types of public, private, and charter schools in this case (Lubienski et al., 2009; Weisbrod, 1998). These data from school marketing materials suggest some degree of isomorphic organizational behavior in the sense that all main types of schools significantly misrepresented their student populations in specific ways in one or both cases. However, the patterns differed by school type in terms of the groups that were misrepresented, and the direction in which that misrepresentation occurred – although it was not in contradictory ways, and the results between the two cities were mixed.

Public schools in the District of Columbia in general drastically underrepresented Hispanic students on their websites, while the marketing from more elite public schools suggested that they had significantly more White students than they did. It is possible that magnet schools see themselves in competition with private schools, which have a disproportionately high level of White students. Charter schools there in general also used marketing approaches that imply that a much higher proportion of White and Asian students attend those schools than are actually enrolled, and this is particularly true with charter schools that were not authorized by the DC Public Schools, suggesting that these schools may also be trying to appear more "up market."

Meanwhile, the marketing from more elite magnet schools and public schools in New Orleans suggested that they had significantly more White students than they did. In that context, though, it is important to remember that the schools remaining in the traditional public school sector – those not converted to charter schools or placed with the RSD – were those that were not failing and, in fact, are seen as rather desirable schools in the New Orleans market. So it is possible that magnet schools in DC and public schools in New Orleans see themselves in competition with private and charter schools. Charter school misrepresentation in New Orleans was more limited, but still present, particularly in a few notable instances.

There were similar patterns in the private schools in both cities. In both cases many private schools over-represented African American students; the impetus for this may have been to increase diversity, but as we saw in the voucher accepting schools from DC, the motivation may have also been financial. That is, the DC private schools that accept students subsidized by public vouchers over-represent African American students in their marketing materials relative to the actual enrollment of those students. Yet other private schools used marketing materials that were quite accurate in their representations of the different student groups that actually attend those schools. This may be due to the fact that private schools accepting vouchers are in more dire financial straits, and therefore need to fill seats to replace declining enrollments caused by similar, but subsidized, options such as charter schools. For them, accepting vouchers represents the best available strategic response to competitive conditions, and they may be less concerned about improving their place in the local market hierarchy and more concerned with meeting the bottom line by appealing to students who might be dissatisfied with current school options. Other private schools, though, may have more financial stability, and can thus concentrate more on maintaining or improving their market position. This group, which includes some exclusive schools, may have less reason to misrepresent themselves or disturb their internal composition.

CONCLUSION

Our research in this area suggests that many schools – and many types of schools – are using marketing as a way to negotiate the terrain of local education markets. Certainly, many school leaders see this as a worthwhile investment. As some have noted, the costs of marketing are often more than regained in increased revenues as additional students enroll in a school or district (Lubienski, 2005b). However, it is important to note that the ability and incentive to embrace such strategies can vary within a local education market. Upper-end schools are better positioned to promote themselves based on reputation or associated criteria. In fact, some upper-end schools refuse to engage in overt marketing, seeing it as less than professional, or wishing to be seen as remaining above the competitive fray. On the other hand, schools on the poorer end of the desirability spectrum market not because of the incentive for gains as much as the imperative to avoid falling behind. Yet these are often the schools with fewer resources available to spend on noninstructional efforts such as marketing.

The chapter advances from the notion that school marketing can tell us something about the competitive incentives that are shaping schools' organizational behavior in increasingly competitive education markets.

We focused on web-based materials because more schools engage in that form of promotion than in any other single effort, so it provides a broader basis for comparison. However, this approach admittedly neglects other rich forms of data on marketing, such as paid advertising campaigns on broadcast media, or in-school events that take on a promotional function, for instance. Based on our broad but less-comprehensive data, we hypothesized that the ways different schools might respond to those competitive incentives in their marketing may relate to the specific type of organization they represent, as well as to their position within the local market hierarchy. The study was motivated by two basic questions. The second question asks whether there are patterns evident within and across school types. As noted above, some patterns are apparent. While the over-representation of White students appears to cut across school types, other significant variations in how schools represent student enrollment in marketing themselves relative to their actual enrollments might be best understood by considering differences in market position – suggesting an important line for future research.

However, the first question – whether patterns indicated that students are differently valued – points to evidence that raises concerns about how competitive incentives may be impacting educational opportunities for those students traditionally underserved in public schools. These data suggest that schools in competitive climates may be pursuing certain groups of students, and, in doing so, appealing to the more advantaged groups, while discouraging those thought to be most in need of new options. For instance, Hispanic students – a growing but more disadvantaged group – are significantly under-represented in marketing materials from some types of school. Meanwhile, White and to a lesser extent Asian students – groups commonly associated with academic success – were significantly over-represented in the marketing materials. We could easily write these inaccurate representations off if they were isolated incidents, but as general patterns, particularly across different types of schools, they may reflect underlying incentive structures regarding how students are differently valued.

When people discuss "school choice" and the multiple programs that have emerged to facilitate that choice, they are usually referring to the notion that families choose schools for their children. However, our findings suggest that the consequent competitive incentives that are generated by those choices may be driving schools to attempt to shape their enrollments – in a sense, for schools to choose their students. This study examined some of the mechanisms by which schools in choice systems may be promoting student sorting. The question of equitable access is a significant concern in American education, and the emergence of choice as an increasingly fundamental feature of the education system necessitates serious study of the potential of choice to address or accelerate patterns of re-segregation. Yet these results have implications outside of the two cities we studied. We believe that additional investigations of this issue are warranted. In particular, exploration of local education markets outside of the United States, drawing on contexts with competitive conditions but with different racial/ethnic and class dynamics, would provide valuable insights into the degree that particular policies or contexts, or market forces themselves, contribute to the differentiated valuation of students in education markets. As a universal theory, much of the neoliberal logic behind policies advancing choice and competition for schools assumes a rather generic model of individual and organizational response to competition, with the hope that increased choice and competition have the potential to improve equitable access to quality schools. These data highlight the importance of school organizational behavior, and marketing in particular, as areas of focus for understanding this potential.

NOTES

1. It is also important to note – going back to Friedman's original argument – that while liberating consumer choice can be an end in itself, it is also expected that the consequent competition generated between schools as they seek to attract students can lead to overall improvements in academic outcomes. That is, incentivized by the loss of a captive clientele, individual schools would strive to satisfy families through more effective organizational behaviors, leading to broad systemic improvements – an objective outside of the scope of this chapter. Caroline Hoxby (2000) tested this thesis by examining metropolitan areas with varying levels of physical boundaries that would be associated with higher concentrations of jurisdictions, and hence greater competition between jurisdictions, finding indeed that this was associated with better academic performance. Although her methodology has been challenged (see Hoxby, 2005; J. Rothstein, 2007), it is generally accepted in the policy discourse that choice leads to competition, which leads to better outcomes.

2. For general population figures, see http://www.census.gov/popest/datasets.html and http://www.census.gov/popest/datasets.html. For public school figures, see http://dcps.dc.gov/DCPS/About+DCPS/Who+We+Are/Facts+and+Statistics/Facts+and+Statistics. Private school statistics are from the NCES Private School Universe Survey in the 2007–2008 school year; see http://nces.ed.gov/surveys/pss/.

3. We note that charter schools are public schools. However, in order to distinguish between the different organizational types, we refer to them using this more distinct label.

4. When no students were represented on the main page, we examined links to "photos" or "gallery" pages, since they could offer general representations of student body composition. Links to specific events such as extra-curricular activities were not considered because of the increased likelihood that such pages would present nonrepresentative images of students, since those activities (such as soccer, or crew) might appeal only to certain segments of the student population.

5. We are using the race categories and terms from the NCES data.

6. Inter-rater reliability was over 95%. It was calculated by examining independent assessments of a sample of schools, and comparing the number of observations for each of the four racial/ethnic categories, which were then averaged (95.33%). This high level of agreement can be seen as a result of three factors. First, the vast majority of the racial classifications were obvious. Second, the researchers regularly discussed classification processes, issues, and difficulties. Thirdly, many of the New Orleans and DC schools are indeed highly segregated.

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PUBLIC–PRIVATE COLLABORATION IN INTERNATIONAL EDUCATION: A NEW ZEALAND CASE STUDY

Christopher Allen Stachowski

ABSTRACT

In New Zealand, educational institutions at all levels are being encouraged by the nation's central government to develop international markets, largely to generate revenue and to therefore decrease dependence on state funding. This chapter presents research findings which show that some managers in education are responding to this challenge by establishing and maintaining relationships to respond to international student demand, a core focus of educational marketing work. These relationships seem to allow high schools, particularly resource-constrained ones, to be able to add value to the international student experience. In this case, this includes offering language tuition and access to support people who speak the students' languages and are familiar with their cultural frameworks as part of the experience. Given the benefits to international students, and to the schools themselves, could this kind of relational approach be considered an example of leadership in international education marketing?

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INTRODUCTION

The research presented in this chapter stems from doctoral research that aims to identify and describe international education marketing strategies in use in New Zealand, and to illustrate the implications for marketing international education well. Although the doctoral research focuses on the post-compulsory (aka post-secondary or tertiary) education sector, there were some unexpected findings that are relevant to a high school setting. It is the aim of this chapter to present these results to promote discussion and debate about good international education marketing practice in the high school context – an area where the educational management research is lacking.

MARKETING INTERNATIONAL EDUCATION – A NEW ZEALAND PERSPECTIVE

If what has been written about international education is true, travelling for the purpose of education is not new. However, in the past two decades, increasingly more people around the world have had the resources to study abroad, leading to an increase in the scale of international education as a phenomenon (D. H. Bodger, Bodger, & Frost, 2006; Naidoo, 2009; Ritchie, 2003).

In New Zealand, the central government has put in place policy frameworks to encourage educational organizations to engage more in international education, largely to generate revenue and decrease dependence on state funding. This emphasis is outlined in the government's International Education Strategy, which encourages secondary and tertiary institutions to increase the economic contribution of international education beyond the current estimated worth to the New Zealand economy of approximately NZ$2 billion (about US$1.6 billion or 1.37% of GDP at purchasing power parity [2010]).[1]

For readers unfamiliar with New Zealand, here is a brief history. In the late 1980s, New Zealand joined the United Kingdom (Flude & Hammer, 1990) and the United States (Berry & Allen, 1977; Whitty & Power, 2000) in introducing market forces to the realm of education (Kirp, 2003). Over the past three decades, market ideas have come to influence how education is managed, from policy to practice. New Zealand initiated this by implementing the Education Reform Act (1989), which allowed the sale of education, by public and private institutions, particularly to international students (Bennett, 1998; New Zealand Market Development Board, 1988). It can be said that this legislative change contributed to the development of market characteristics in the education sector in New Zealand, including:

- deregulation, increased institutional autonomy and competition based on responding to student demand;
- open enrolment and aggressive recruitment practices; and
- an austere public funding model, accompanied by messages from senior public officials for institutions to 'find resources elsewhere'.

Although such policy settings still attract impassioned debate around the world (for instance, see Barrett, 1996; Michael, 1990; Newman & Khosro, 2009; Robinson & Long, 1987), it is clear that these reforms in New Zealand, and similar reforms around the English-speaking world, are here to stay. This has set an environment in which educational managers can develop revenue by selling education to international students (Bourke, 2000; Dill, 1997; Kwong, 2000; Oplatka, 2002; Whitty & Power, 2000). However, this requires the capability to do so (Glatter, 2002).

Recent history in this country has shown that offering international students the experience they want can be a challenge. This seems particularly true in the private sector, where over the past decade a number of privately-owned and operated educational institutions have gone bankrupt suddenly, drawing widespread criticism for not adding value to the study abroad experience (Butcher, 2002, 2003; Butcher & McGrath, 2004; Collins, 2006; Daniels, 2006; Dye, 2004; Ibbertson, 2005; Mengsheng, 2004; Mengsheng, Baker, & Marshall, 2002; Mengsheng & Green, 2003; O'Sullivan, 2003; Quirke, 2004; Selvarajah, 2006; Shepheard, 2002; Walker, 2003). This criticism was largely directed at privately-owned and operated English language schools (language schools henceforth), a number of which had gone bankrupt, leaving international students in an unenviable position.

This corner of international education has not been insignificant in that language schools were responsible for 51% of the total international student head-count in the country in 2002, and again in 2006 (MOEID, 2007). In the 12 months to March 2010, New Zealand language schools enrolled 41,798 students, earned around NZ$140 million in tuition and other related fees, and totalled 13.3% of all exports. From a marketing perspective, there is much we do not know about how these schools fit into the international education ecosystem, and how they operate. Fig. 1 shows this scale.

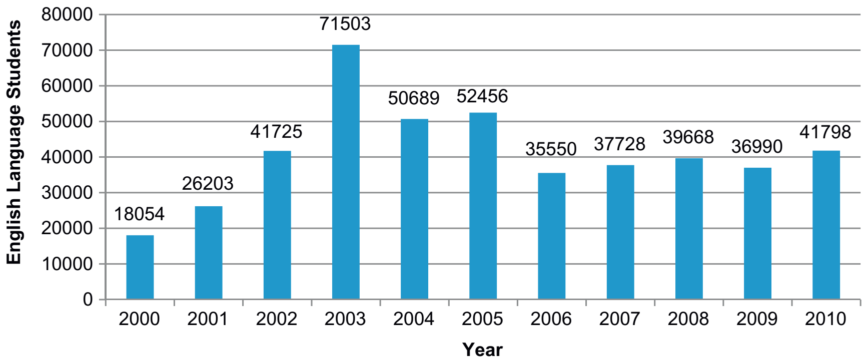

Fig. 1. English Language Students in New Zealand (2000–2010).
Source: Statistics New Zealand Report, ISSN: 1178-069X.

To date, little empirical evidence has demonstrated how language schools add value to the study abroad experience. The research presented in this chapter deals directly with this topic.

METHODOLOGY

This chapter reports on some of the results of a qualitative case-study undertaken as part of doctoral research which aims to identify and describe international education marketing strategies in New Zealand private, tertiary education, and to discuss the implications for how managers deal with culture as part of their work. In particular, it proposes that some educational institutions are specializing in offering a narrowly defined educational experience, also known as niching. It also proposes that such an approach has implications for the way international education marketing strategy takes culture into account.

A case study approach was taken because marketing international education is:

- a context about which little is known, and where a practical/pragmatic result to inform practice is desired (Creswell, 2003; Johnson & Onwuegbuzie, 2004; Rescher, 2000; Sandelowski, 2000);
- by nature interdisciplinary research, spanning the educational management and marketing research genres, (Bogdan & Bilken, 1992; Briggs,

2005; Briggs & Coleman, 2007; Craig & Douglas, 2001; Hemsley-Brown, 2006; Oplatka, Hemsley-Brown, & Foskett, 2002); and
- an area where unexpected results are likely (Balogun, Huff, & Johnson, 2003; Maxwell, 2005).

The study focussed on examining managerial practices in small educational organizations, a growing area of interest in the wider educational management body of research (Battisti & Perry, 2008; Briggs & Coleman, 2007; Chetty, 1996; Cope, 2005; Elliott & Crossley, 1994; Fuller & Cummings, 2003; McLarty, 1998; Stachowski, 2008; Tsang, 2001; Yin, 2003). Since privately-owned English language schools have been singled out as an area needing empirical examination, it was logical to focus on these types of organizations in the case study.

As part of this approach, it was presumed that there are people in language schools responsible for international marketing, but who might not be explicitly called 'marketing managers'. These people are referred to as 'practitioners', and it was also presumed that these people would be interested in sharing how they approached their work. It was also assumed that the author's experience, though in a classroom rather than marketing sense, would help to inform insightful analysis, but not be too close to drive the research towards bias.

Having never actually practiced marketing in an educational setting, the author's views of this work were largely theoretical, from the outside and probably simpler than is reality. This was a helpful balance because enough was known to be able to design a research project of the context, but not enough to have predetermined ideas about what practice should be. Nevertheless, a member checking technique (Chetty, 1996) was included in the design as a way to mitigate any potential researcher bias which may have emerged.

Based on these assumptions, it was decided that a good method for capturing practice would include engaging with practitioners themselves, through in-depth discussion. The findings reported in this chapter are restricted to those that arose from interviews held with practitioners at language schools that were:

- independently-owned – not part of a chain, for example New Zealand Language Centres.[2] This was important because it was the intention of the author to focus on an organizational context where there appeared to be the most questions around marketing practice. Independently-owned, New Zealand-based language schools was one such context; and

- providing English language teaching as their core educational offering – the schools included in the study identified as language schools. This was considered important because there is an entire subsector in New Zealand of privately-owned business institutes, which offer some English language as a part of the overall pathway. These institutes are certainly large enough as a group to warrant their own focus. To keep the sample tightly connected by context, these institutes were kept outside the scope of the research.

These criteria helped to reduce the New Zealand language school sector down to a few dozen schools. Within this group, both rural and urban language schools were included, as well as long-established and newly established schools for diversity's sake. The data was collected between September 2010 and July 2011, during which time 10 practitioners across the North Island of New Zealand were interviewed. Slightly more than half of the practitioners were from well-established language schools that had been in business for 20 years or more. The remainder were from language schools established in the past 10–15 years, with one having been open for only a year.

Participants were contacted through professional contacts, by 'cold-calling' emails found on school websites; by using contact email addresses found on government agencies' websites; and by using email addresses found on Education New Zealand's website. In each case, interviews were held at the language school and were about one hour long, and semi-structured in nature.

Given the limited and variable view of marketing as an activity in education, noted in the wider educational management literature, marketing jargon was avoided. The interviews started by being asked to tell the story of the school. This technique was used to allow practitioners to talk about all the things associated with serving an international student, rather than just narrowly talking about what they think marketing is. This approach has been successfully applied by Oplatka et al. (2002) when working with people unfamiliar with marketing jargon.

The interviews were recorded. Immediately following the interview, a one-page summary was prepared, which included initial impressions, interesting points to analyse, reflections on interviewing approach to prepare for the next interview and relevant quotes/ideas taken down. A content analysis method was then applied to identify common themes in the data (Krippendorff, 1980). A member checking sheet was prepared which included a conceptual matrix of the quotes and paraphrases taken from the interview data (Miles & Huberman, 1994). Each sheet was sent to the respective participant who was asked for feedback. Adjustments to quote/paraphrases were made by the participants where necessary.

Thematic analysis of the data uncovered that, among other things, managers at language schools and state-owned high schools are working together in a way which responds to international student demand by adding value to the study abroad experience in New Zealand. This behaviour suggests a relationship marketing approach.

A RELATIONAL APPROACH TO MARKETING: DEFINITIONS AND KEY PRINCIPLES

Trying to add value to meet the expectations of international students is what is at the core of educational marketing, historically defined as follows:

> The analysis, planning, implementation and control of carefully formulated programs designed to bring about voluntary exchanges of values with target markets to achieve institutional objectives. Marketing involves designing the institutions' offerings to meet the target markets' needs and desires, and using effective pricing, communication and distribution to inform, motivate and serve these markets. (Kotler & Fox, 1994, p. 6)

All participants interviewed explained that relationships play an important role in being able to offer the kinds of experiences that international students want. One of the research participants summarized this well, explaining that:

> Part of my marketing is to have good relationships with people in the community. Relationships need to be at a deep level, you have to put time and effort into it.

Given how often relationships were mentioned by practitioners, it was logical to examine the data against relationship marketing frameworks. Though there were none dedicated to the educational context, the literature contained many definitions of relationship marketing in the wider business literature. From a brief review of well-referenced works, it seems that there is little agreement on what exactly this kind of marketing approach looks like. Several widely cited definitions include the following:

> '[T]o establish, maintain and enhance relationships with customers and other partners at a profit, so that the objectives of the parties involved are met. This is achieved by a mutual exchange and fulfilment of promises'. (Gronroos, 1994, p. 9);

> 'An organization engaged in proactively creating, developing and maintaining committed, interactive and profitable exchanges with selected customers (partners) over

time is engaged in relationship marketing' (Harker, 1999, p. 16) – this is an amalgamation of twenty-six definitions; and

'Marketing based on interaction within networks of relationship'. (Gummesson, 2002, p. 3), or 'Relationship marketing is marketing seen as relationships, networks and interaction'. (Gummesson, 1994, p. 5)

Worth mentioning is the fact that not one of these works takes into account the tension that arises around the concept of 'marketing' in education. This is a tension which some argue exists because the current practice and/or perception of marketing is too narrowly restricted to advertising and 'giving a hard sell' (Oplatka & Hemsley-Brown, 2004). Gibbs (2008, p. 276), a serial contributor to educational marketing research (Gibbs, 2001, 2002; Gibbs & Knapp, 2002), has recently explored this tension and suggests that a crucial challenge in marketing the educational experience exists in making sure practice actually reflects the characteristics of education – 'being a community of sharing, caring, reflection and deliberation', and being a service where the benefit is not seen for some time after the experience.

Having a definition that recognizes the unique nature of the educational context when bringing in outside managerial ideas was noted long ago (for instance by Glatter, 1997; James & Phillips, 1995). And to date, there has been some effort to show how a relational approach can look in an educational setting, for instance using the Internet as a tool to build relationships with students (Klassen, 2002), or using relationships to manage student satisfaction and therefore reputation (Helgesen, 2008). However, there are many educational contexts beyond the university one, and about these we know little. There is a call in the literature, for instance by Hemsley-Brown (2006), to broaden our understanding of these contexts.

Despite the limited evidence of how a relational approach to marketing might apply in an international education context, from the literature it is possible to see that a relationship marketing approach:

- can happen on its own or as part of a wider, more sophisticated, and high-level approach;
- may be the result of tacit behaviour; and
- can include relationships between organizations that facilitate a marketing benefit for both parties (Ambrosini & Bowman, 2001; Dibb & Meadows, 2001; Gronroos, 1994, 2004; Gummesson, 1994, 2002, 2004).

However, Gummesson's (2004, p. 110) definition is particularly helpful because it includes details associated with a relational approach, for instance noting that these relationships can vary in depth, are not restricted to those who sell and those who consume, and are often seen by practitioners as the practice of 'managing market relationships', rather than 'relationship marketing' as the literature sees it. For the purpose of this discussion, the most important point that Gummesson (2004) makes is that a relational approach can be many things, but at the heart is the intention to add value to the core exchange. A relationship marketing approach is one which seeks to utilize relationships to add value. And the results from this research, when matched against these definitions, indicate that in international education such marketing behaviour is taking place.

FINDINGS

The main finding of this research is that those people responsible for the marketing of international education (in this chapter called practitioners) seem to be establishing, maintaining and leveraging relationships with one another to offer a study abroad experience which meets international students' expectations. The relationships seem to allow state-owned high schools to respond to the demand to: include English language tuition as part of the study abroad experience; and to have access to support people who are familiar with international students' languages and cultural backgrounds. Both of these results can be linked to the definition of educational marketing presented by Kotler and Fox (1994), particularly from the perspective of designing educational experiences which meet international student demand. The use of mutually-beneficial relationships to achieve these things brings this marketing behaviour in line with Harker's (1999) and Gummesson's (2004) definitions of a relationship approach.

The following two sections present the data showing the nature of these relationships.

OUTSOURCING ENGLISH LANGUAGE TUITION

The data indicates that there are state-owned high schools in New Zealand which prefer not to offer English language tuition to international students as part of the study abroad experience even though there appears to be demand for it. This looks to be a gap between what international students of high school age would like in a study abroad experience, and what is being offered in New Zealand. Comments made by research participants that reflect this demand include the following:

> '[International students need] language before they start at high school'.
>
> '[International students] come to immerse in the college life for one or two years, and they do every subject. When they first come, they have very little English and it takes a whole term to understand the teacher; to actually start working in the classrooms'.

The findings show that the main mechanism driving this arrangement is referrals. For example, language school practitioners said:

> 'I have good relationships with the high schools, and I will get good referrals from the high schools'.
>
> 'We have partnerships with local high schools [that] will send students to us that they have recruited, and because their English level is not ready for the mainstream school programme, and they will come to us for a term, take a test to see if they are ready to go back, so that is a big part of what we do'.
>
> 'We have got one [student] here enrolled for a month before he starts over at the college'.

The data suggests that the referral system not only deals with would-be students, but can also include international students who have enrolled in a local high school, but who still need to improve their language skills. For instance, one practitioner noted that:

> We get the college kids coming over in the holidays for two weeks, for the holiday programme. So I've said to the local colleges, this is our proposal, that they do a term here, or even four weeks, and we give them basic English enough to [go] straight into the high school system and start learning from day one. They are starting to think – good idea.

Such a referral system would seem dependent on the high school feeling satisfied with the educational work of the language school in terms of international students being demonstrably prepared for mainstream high school study in English. The fact that domestic high schools continue to refer students to partner language schools on an on-going basis across the country is the most compelling evidence that high schools value the work of partner language schools. One practitioner explained this well, saying:

> One Korean girl who is about 15, she was over there (at the college) and she had started in term 4[and] she did not speak a word, so we arranged for her to come here for the holidays and then in term 1 when she went back, I had the teacher ringing me up and saying, 'What did you do to her? She's got confidence. She's talking', and she is coming back next holiday because she just wants to keep improving.

For those high schools which are not keen to develop an English language department in-house, it looks like 'outsourcing' to privately-owned and operated schools is an option. The data shows that to achieve such an arrangement, educational managers are establishing, maintaining and leveraging relationships with one another in line with Harker's (1999) definition of relationship marketing which says that the relationship must be mutually-beneficial. From a marketing point of view, the benefits to those involved appear to be the following:

- The international student can have the experience they wish to have – a key focus of marketing;
- The high school can add value to the study abroad experience at their school and therefore remain competitive in international markets; and
- The language school gets on-going enrolments through a referral system with partner high schools.

This evidence goes against the criticism noted earlier in this chapter suggesting that language schools are not adding value to the international student experience. In fact, the results show there is another value proposition associated with this relationship, which has to do with providing language and cultural support.

PROVIDING LANGUAGE AND CULTURAL SUPPORT

How international students are supported through their study abroad experience may not seem like a marketing issue to some managers in education. However, the wider marketing literature very much includes customer support as being an important part of marketing a service. This chapter argues that pastoral care, as it is often called in New Zealand, can be seen as the international education context's equivalent of customer support.

One practitioner explained the importance of taking a holistic view and providing a good overall experience to international students:

> [International students] don't go home and say to their mates, 'you should go to School A because I improved from here to here'. They go home and say to their mates, 'go to School A because I had a wonderful time, I improved my English, but I had a wonderful time. I was well looked after, I was supported by the staff, the homestay was great, it was a positive experience all round and that is how you are going to grow'. Our outcome must be just a positive experience all round. It's a tough sell but you have got to get everything right.

In this research, managers seem to believe that good pastoral care involves access to an international person who focuses entirely on the international student and their experience. And ideally, this person should be someone who has some understanding of the students' language and cultural backgrounds. This is interesting because pastoral care has been noted as an area needing improvement (McGrath & Butcher, 2003). Yet, in this research some English language schools are not only good at it, but they even specialize in this kind of service. As one practitioner explained:

> [The owners started the school in 1989 after returning from living in Japan]. When they came back to NZ, they realized that at that time, there was a demand for Japanese kids to come over and undertake high school programmes in NZ, but that the high schools were not really set up to welcome international students and support them. So [this school] was set up as a kind of Guardianship Company [that] supported Japanese students and placed them in high schools.

Moreover, almost all those interviewed at language schools seem to believe that their own language schools are good at providing this kind of service. As one manager explained:

> Language schools by nature are pretty small [which means that] you are not a faceless student here as you would be at a university. Everyone knows you [and] the teacher or someone is going to pick up [when something is not right]. That will get followed up on at most language schools, because they care about the students.

From a marketing perspective, the domestic high school cannot benefit from economies of scale as a language school might be able to if they develop productive marketing relationships with a number of high schools. This makes it a more viable value proposition for language schools to employ a number of native speakers than it would be for a high school which might only have a handful of international students.

The need for this kind of support seemed to arise because in this case:

- students are under 18 years of age and are often abroad alone for the first time; and
- a majority come from northern Asia-Pacific nations where the cultural frameworks are quite different from those in New Zealand.

As one practitioner explained, students from Asia seem to need more support than those from European countries, for instance:

> [Japanese] have more difficulties at school, they had more difficulties with their host families, they didn't like the food, they couldn't understand the bus drivers, for them there are many, many more difficulties.

Whereas:

> German students bring such a good knowledge of English [that] they can go into mainstream schooling. They need hardly any preparation, [and] hardly any English-as-a-second-language classes. For most schools, the German students are low maintenance. Germans are more independent, they know what they want and because they understand the language so much better than the Japanese. For example, [German students] can actually understand what their options are at school [and] blend in much quicker.

The use of someone who is familiar with students' language and culture is supported by some practitioners because these students:

> [lose] their whole support network when they study abroad. You have got a 14 or 15-year old kid that is freaking out and does not really speak because it's the first time they have been overseas without their parents, those are the ones who are going to sit and suffer. [That is why] having a native speaker, someone from that culture [is important].

The language school approach to international student support looks to be of value to high schools in that there is a stronger focus on the international students' well-being, because:

> the homestay coordinator [at the high school] is usually more interested in the families being happy because the students come and go, but the families, they want to keep them in the school environment. If I am biased, then I am biased slightly towards the student and because my students are all German, I come from the same background so I know what their difficulties are.

Having someone who can communicate with the international student in their own language was seen as helpful because students might struggle to express themselves well, which could have an undesirable impact on a teenager's study abroad experience. For example, some students might feel:

> I just want to solve my problems, and I don't want to practice my English telling you how miserable I am, how horrible my homestay is, etc.

The native speaker approach seemed particularly helpful when working with cultures that internalize dissatisfaction. One practitioner said that:

> [We] have got to keep a very close eye on student satisfaction as [they] go through the course. [The] advantage [is that] we have full-time native speakers to keep a close eye on everybody. [We] are dealing with a lot of cultures that don't complain, Japanese being a good example. The killer is the student who smiles and nods and gives you positive

> feedback, 5 out 5 on all of the sheets you give them [and] then the agents says, 'Takashi did not like the school' [and] you have lost it then.

In addition, this approach seems to be valued by the international students' parents because, as one practitioner said:

> It is very easy to sell to the student, or their parents, the idea of one person taking care of everything. They are comfortable to send them to [our school] because Mr So-and-So there is from their country, speaks their language and will look after the student and make sure he does not get into any trouble, and help him out when he needs to.

Having a native speaker working with the partner high schools also means that:

> [The] student can speak in German, which makes problems sometimes a little easier to talk about, so I try to work as close as possible with the homestay coordinator to get down to the source of any difficulties, and to try to solve them together with them.

It appears that the native speakers and people in the high school work together to share the tasks associated with a study abroad experience. One language school practitioner (also a native German speaker) said:

> [Before the students arrive,] I dedicate most of my time talking to the high schools, trying to catch up. Is everything ready for their arrival? I spend a lot of time reading their profiles and trying to find out which school is the best for them. I choose the school through that profile and the school chooses the homestay family.

And once the students are in New Zealand:

> I am catching up with the high schools asking how [the students] are. The people I communicate with are mostly part-timers; [either] the homestay coordinator directly, or the international dean, or international manager. Each high school has its own name for it. Generally, it is two people. I have to know which of these people to contact.

The behaviour described in this section can be linked to Gummesson's (2004, p. 110) definition of relationship marketing, which says that maintaining two-way communication is part of a relational approach. There was definitely widespread agreement that if there was not regular contact between the language school and the partner high schools, there was a risk that the high school might develop a relationship with another language school, if there were any in the region. Some language schools even sent regular newsletters to keep top-of-mind and to continue promoting their language school and its services to the partner high schools.

Sometimes, the services of language preparation and student support are combined. For example, at one language school, international students spend:

> four weeks with us and then go off to a high school around New Zealand for a year, but we are still the contact for their parents back home.

And, sometimes the 'native speaker' is simply a contact:

> [on] the side-line, which then means that I usually get in touch with the student if they have got difficulties, so if I do not hear from a student for a year, that is a good sign. This means I usually work with the difficulties rather than the happiness, but that's ok, that's just what the job is.

In summary, the data shows that some managers believe it is good practice to provide international high school students with access to those who can provide adequate language and cultural support to international students. However, resources may not allow the high school to hire a number of support people to provide this service in-house. For these people, this is a benefit of building a relationship with a language school which can deliver this service on the high school's behalf for a portion of the international student fees. This behaviour not only falls in line with educational marketing definitions more broadly (e.g. Kotler & Fox, 1994), but also aligns with definitions of relationship marketing, particularly the ones by Harker (1999), Gronroos (1994), and based on the principles of a relational approach in a school setting presented by Oplatka and Hemsley-Brown (2004).

DISCUSSION AND IMPLICATIONS FOR PRACTITIONERS

Over the past two decades in New Zealand, and possibly around the English-speaking world, international education has increasingly become a focus of policy makers who see international markets as a good source of revenue for schools, universities and polytechnics alike. Realizing the benefits of well-developed international education markets requires educational managers to offer the kinds of study abroad experiences that international students want, within reason. If Kotler and Fox's (1994) definition is used, this is educational marketing work, but in an international context.

International education is one corner of education where market principles seem most obvious, and it is also a space where privately-owned and operated organizations are very much present. However, in the past decade, some have suggested that privately-owned schools, language schools in particular, do not add value to the international student experience. Language schools are not insignificant in New Zealand, enrolling tens of thousands of international students annually. Therefore, it is worth providing some empirical work to see how these organizations might add value.

The findings presented in this chapter show that some language schools are indeed adding value to the experiences of international students, contrary to the criticisms which exist in the media. This value seems to be created through the establishment of mutually-beneficial relationships between managers in high schools and language schools. This behaviour is in line with a number of relationship marketing definitions, especially Harker's (1999), and seems to result in high schools being able to offer international students the experiences they want. The findings suggest that this includes English language tuition and access to a support person familiar with international students' language and cultural backgrounds.

One might consider this demand to be reasonable in that international students need to have a good grasp of English if they are to be successful in an English-speaking environment. And if international students increasingly want to begin their study abroad experience with English language tuition, then high schools which offer this as part of the package are going to be more attractive than those which do not. For those high schools which do not have the resources to invest in offering language tuition, but want to be competitive in international education, one option is partnering with a school which can offer this, as was shown in this research.

One might also consider it reasonable for international students to want to have someone who can speak their language, and who is familiar with the students' cultural frameworks, to offer 'customer support'. After all, these students are under 18 and often away from home on their own for the first time in their lives. Some high schools in New Zealand clearly prefer to outsource this function to language schools which can provide international people to offer this kind of service for a portion of the international fees.

This appears to be a clever way to meet international student demand whilst shifting much of the risk to the partner, which in this case is in the private sector. In the event that there is a reduction in the demand for in international education, the high schools are not left with empty classrooms and an army of support people with no students to support. But this requires a good working relationship and for the language school to stay in business. This means that high school managers might need to look outside their context and start engaging with people in places where traditionally state-owned high schools may not be present, for instance in private education.

Earlier in this chapter, it was noted that there are calls for educational marketing practice to reflect the unique aspects of the educational setting. A collaborative spirit is one such aspect with a long tradition in educational management, and this chapter shows examples of this collaborative spirit being used to respond to international student demand and to add value to the study abroad experience. Given the benefits to school and student, this chapter argues that this kind of relational approach might be considered an example of leadership in educational marketing.

During a recent presentation to European business leaders on TED.com, British former politician and diplomat Paddy Ashdown said that, ‘the most important thing one can do is what one can do with others’. He suggested that we live in an interconnected world with rapidly shifting power dynamics, and therefore we need to work together to achieve our goals on the international stage. In international education, the student has the power of choice, not just in terms of school, but also destination. To respond to international demand may, therefore, require a change in mind-set for some educational managers who are not accustomed to this power dynamic, but who want the benefits of participating in international education. Perhaps it is time for state-owned high schools round the world to consider how relationships with the private sector can add value to the experiences of their international students.

LIMITATIONS AND FUTURE RESEARCH

The key limitation of this research is that it could not capture the views of high school managers who are working with language schools in international education, or the views of the students themselves. This data would provide a more complete picture of the context. For instance, it would have been interesting to include a number of other participants, such as host families, tourism enterprises who worked with these language schools, teachers and so on. This research recognizes that there are many views of international education marketing, but that most are outside the scope of the resources for the project. There are certainly many opportunities for the interested researcher.

A relational approach to international education marketing is something we know little about. To complement this research, the author invites future researchers to investigate how high schools see these relationships, or to capture the international students’ views about their experiences with language schools. Since high schools are more numerous than language schools, one logical next step might include a quantitative survey to see how many high schools are partnered with private organizations and what the perceived benefits are.

NOTES

1. The International Education Strategy can be found at: http://www.minedu.govt.nz/NZEducation/EducationPolicies/InternationalEducation.aspx
2. See http://www.learnenglish.co.nz/ for an example of a chain of language institutes.

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RELATIONSHIP MARKETING AND SCHOOL SUCCESS

Dorit Tubin

ABSTRACT

School marketing and its contribution to school success is a controversial issue in education, and although marketing activities are taking place in schools, they are usually not recognized as such. Relationship marketing (RM), collaborative interactive relations that enlist partners in loyal and supportive long-lasting connections, is no exception. By studying five successful Israeli schools, this study aims to reveal how successful school principals engaged in RM and contributed to their school's success. An "ideal type" of RM was extracted from the data, showing that good RM starts with a key event, develops under enabling conditions, and brings about the desired outcome along with additional consequences. It concludes that successful school principals, like Molière's protagonist who has unwittingly been speaking prose all his life, create RM in their ongoing work without terming it this way, and that this RM contributes to school success. Theoretical and practical implications are presented in the discussion.

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INTRODUCTION

School marketing and its contribution for school success is a controversial issue in education. While some educational scholars found that schools would benefit from marketing activities and need marketing to survive in the competitive environment (Drysdale, 2001; Foskett, 2002), others think that there is no need for marketing activities in schools and that it even undermines the value of the educational process. The gap between these contradictory perceptions can be explained by the school context: in a competitive education arena, where school choice, school autonomy, and league tables present external pressure on schools, principals see marketing as a useful mechanism for enlisting prospective students, while in more stable environments where students' flow is determine by means such as enrollment zone, principals see no need for marketing (Oplatka & Hemsley-Brown, 2004).

This explanation is not sufficient, however, to clarify the gap between marketing actions and marketing perceptions, where educators are engaged in marketing activities but explain them differently. As found in Oplatka (2007), for example, principals who are engaged in marketing activities and realize the significance of this managerial function for the survival and success of their school, also explain that they only provide real and honest messages, they do not sell something that does not exist, and they deliver what they promise. In other words, marketing aims and marketing actions do not fully match.

In this chapter it is claimed that this gap between marketing actions and marketing perceptions has to do with relationship marketing (RM) and school success, and explaining this claim is at the heart of this study. In the organizational learning theory, this gap is termed by the concepts of theory-in-use and theory-of-action, which refers to the difference between what workers do in the name of the organization and how they explain their actions (Argyris & Schon, 1996). Bridging this gap is important for several reasons: first, to enhance actors' control and understanding of their behaviors and outcomes. Second, to sharpen and detail the actions involved in the marketing process with special emphasis on RM, and third, to clarify the ways by which RM can contribute to school success.

Assuming that the best place to study these issues is by examining the behavior of successful school principals (as detailed below), the objective of the chapter is to shed some light on the concepts of RM, describe how successful school principals engage in RM, and explain these RM contributions to school success.

LITERATURE REVIEW

School staff is engaged in many actions that can be defined as marketing practices, such as building a distinctive identity, developing a strategic plan, establishing cooperation with stakeholders and allies, circulating brochures and leaflets, and establishing open days, parents' meetings and fundraising events (Oplatka & Hemsley-Brown, 2004). But if asked, principals can explain these actions as everyday practices needed for running a school: vision and distinctive identity required for giving meaning and direction to the school community, cooperation with stakeholders needed to enhance school legitimacy in the community, and open days and parents' meetings necessary for information diffusion and clarification of expectations (Tubin, 2011). And vice versa, there are workers who consider their job activities as marketing activities, as found among academics who believe that quality teaching and fruitful research serve a major contribution to the marketing of their higher education institution (Oplatka, 2009).

These differences between what people do and what they explain is known in the organizational learning theory as the espoused theory-of-action and the tacit theory-in-use. The theory-of-action is the explicit theory which is advanced to explain or justify a given pattern of activity, and the theory-in-use is the system of beliefs that underline action and is implicit in the performance of that pattern of activity. The theory-in-use is "embedded in routines and practices which may be inspected and decoded even when the individuals who carry them out are unable to put them into words" (Argyris & Schon, 1996, p. 13). The organization theory-in-use includes in its scope all the instrumental knowledge the organization needs to operate, such as communication and control, allocating resources, rewarding and punishing, constructing career ladders, recruiting new members, and so on. However, due to different systems of values and expectations inside the organization and with outside stakeholders, usually there is incongruity between the theory-of-action and the theory-in-use. In the case of marketing, the difference between school actions (theory-in-use) and school explanations (theory-of-action) could reflect not only the different values and expectations, but also differences between two definitions of marketing: as philosophy and as function.

The various definitions of marketing could be divided between those that see marketing as function and those that see marketing as philosophy. Marketing as function is defined as "a set of planned and coordinated activities that an organization is engaged in to elicit a favorable response from potential and current customers" (Drysdale, 2001, p. 2), and marketing as philosophy or mindset is defined as a "management process whereby the resources of the whole organization are utilized to satisfy the needs of selected customer groups in order to achieve the objectives of both parties" (McDonald, 1989, p. 8). Many times, and especially in education, marketing as function is associated with manipulation, persuading, propaganda, and attempting to influence people to want what they do not need, by exaggerating, embellishing, or misleading what the product or service is, and exploiting people's vulnerabilities (Drysdale, 2001). These associations of marketing as function are at the heart of resistance to marketing in education. On the other hand, if satisfaction of students' learning needs is the main school goal, most educators would agree that the resources of the whole school should be utilized to satisfy these needs, as defined by the view of marketing as philosophy.

The main argument in this chapter is that there is special marketing activity that is particularly helpful in describing how schools can at the same time "achieve the objectives of both parties" and "elicit a favorable response from potential customers." This marketing activity can bridge the gap between marketing action and marketing perception, while promoting school success. This is RM.

Relationship Marketing

In the 1950s, marketing was merely associated with selling and advertising. Since then, and along with sociological and economic changes such as the emergence of global marketing with local customers, and technological advances that enable businesses to analyze customer behavior and suggest one-to-one marketing and loyalty programs, marketing approaches have shifted from emphasizing transactions with anonymous customers, to developing and managing relationships with identified customers (Grönroos, 1997; Sheth & Parvatiyar, 2002). Consequently, the role of marketing has changed, and instead of seeing the seller–buyer connection as a series of transactions, each of which has a distinct beginning, short duration, and abrupt end, marketing began to be perceived in terms of lasting relationships between partners (McLaughlin, Osborne & Chew, 2009).

Somewhat paradoxically, it seems that to be an effective competitor requires one to be a trusted cooperator (Morgan & Hunt, 1994). In other words, to operate in a competitive environment where resources are scarce and some goals cannot be achieved independently, the organization has to establish marketing relations with various partners – relations that are directed toward establishing, developing, and maintaining successful relational exchange (Morgan & Hunt, 1994). These special kinds of marketing acts are defined as RM: a strategy that attempts to establish, develop, enhance, and maintain relationships and involve people over the long term, so that they are loyal and supportive of the organization (Drysdale, 1999, p. 36).

Who are the relevant partners for RM? According to some scholars, different partners are available on different levels: at the micro level there are the recipients of the services, at the mezzo level there are decision-makers for policy formulation, and at the macro level there are partners for inter-organizational collaboration (Mclaughlin et al., 2009). Others broaden the partners' definition from the dichotomy of ''suppliers'' and ''customers,'' or ''sellers'' and ''buyers,'' to partners exchanging resources: partners such as goods and services suppliers; lateral competitors, government and non-governmental organizations (NGOs); ultimate and intermediate buyers; and internal partners such as business units, employees, and functional departments.

Scholars agree that RM supports organizational performance (Palmatier, Dant, Grewal, & Kenneth, 2006), but they are still searching for the factors influencing the effectiveness of such relations. Some found that RM is more effective when the target of the relationship is an individual rather than an organization (Palmatier et al., 2006), when the relationship is an interactive process and not a transaction exchange, and when value is added to the relationship through collaboration (Sheth & Parvatiyar, 2002). Morgan and Hunt (1994), for example, found that trust and commitment are key factors for engendering cooperation, whereas Palmatier et al. (2006) found that expertise and communication are the most effective relationship-building strategies. Becoming too deeply embedded in a relationship, however, can lead to unproductive exchange or close new and alternative relationships (Mclaughlin et al., 2009).

While the concept of RM is applied in business and service organizations, it is also applicable to educational organizations. Educational policies such as parental choice, self-management schools, personalization, standardization, and new managerialism, which enhance school accountability and emphasize students' achievements, have paved the way for marketing practices, including establishing RM with various partners (Hartley, 1999). Hemsley-Brown and Oplatka (2006), for example, state that RM strategy seems to be compatible with the nature of higher education services because it promotes the involvement of students in the marketing and image-building of their institutions; Luminiţa (2009) found RM to be a viable strategy in the context of higher education, as service staff (lecturers, secretaries, administration officers, personnel, etc.) are to be responsive to the students' needs and expectations.

The RM approach also becomes relevant for schools. As a consequence of the "quasi"-market in educations, students and parents are transformed into informed customers who rely less on government-sponsored league tables and cognitive consideration, and more on relationships (Hartley, 2008). It was found, for example, that communication with parents has the strongest effect on a school's positive image, which in turn strengthen parents' loyalty (Li & Hung, 2009). Although RM practice is regarded as new, it is actually an old phenomenon of building and maintaining relationships, a practice that educational leaders have long perceived as their responsibility (Drysdale, 1999; Oplatka, 2007). To learn more about how school principals use RM for promoting their school, we should learn from the studies of successful schools' principals.

Successful Schools' Principals

Although school leadership research is as ancient as the field of educational administration itself (Oplatka, 2010), in recent years the importance of the principal for school success has become more and more evident and recognized (Leithwood & Day, 2007). The International Successful School Principal Project (ISSPP) is one of these research efforts. Begun in 2001, it operates in 15 countries and aims to better understand what successful heads and principals do in this demanding and turbulent environment.

School leadership was defined as "those persons, occupying various roles in the school, who work with others to provide direction and who exert influence on persons and things in order to achieve the school's goals" (Leithwood & Riehl, 2003, p. 9). According to this definition, school leadership should market their school in the philosophy manner to satisfy students' needs. This was actually found in the ISSPP study, where across countries, all principals share common features such as promoting student learning and development by the ability to harness the whole community to contribute to the school (Gurr, Drysdale, & Mulford, 2005).

For example, in nine successful Australian schools, it was found that school success relates to the relationships with the school community (Gurr et al., 2005); in four Swedish schools the strong relations with the district were found to be central to school success (Hoog, Johansson, & Olofsson, 2005); and in two successful schools in Shanghai, the two principals fully exploited their educational system in the interests of their schools, one at the municipal level and the other at the national level (Wong, 2005).

The relations with the parent were also found to affect school success, as in the case of eight Danish schools (Moos, Krejsler, Koford, & Jensen, 2005) or in the case of the challenging, high-poverty schools in the United States where it was found that principals worked hard to involve parents and other community members in school activities and decision-making to reconnect the school to its community (Ylimaki, Jacobson, & Drysdale, 2007). To sustain school success, the ability to develop network relationships grounded in mutual support, care, trust, and consensus, is also found to be significant (Giles, Jacobson, Johnson, & Ylimaki, 2007).

Some of these relationships the successful school principal conducted with partners in the school's environment are RM. To learn more about the subject, the current study, which was conducted on five successful Israeli schools, aims to answer the following research questions:

1. Who are the main partners of the principal for RM?
2. What are the characteristics and circumstances that allow such relationships?
3. How do these RM contribute to school success?

METHODOLOGY

The method applied is a multiple case study of ''extreme cases'' of successful schools (Merriam, 1990), which enabled identification of the best RM practices across different school contexts. The present study was conducted in Israel; thus a brief review of the Israeli context is now presented.

The Israeli context

Israel has a total population of about seven and half million (80% Jewish and 20% Arab), with 4,200 schools, divided between the Jewish secular sector (38%), the religious sector (19%), the Ultra-Orthodox sector (23%), and the Arab sector (20%). Education is compulsory and free for all children from the age of 5 (kindergarten) to 16 (10th grade), and free for the 11th and 12th grades, with 93% of students completing 12 school years (Central Bureau of Statistics, 2008). In general, the Ministry of Education is the employer of elementary and junior-high schools teachers and provides schools with supervision and curriculum for all levels of education, while the municipalities provide the maintenance staff, school buildings, materials and equipment, and are the employers of high school teachers. Although there are no private schools in Israel and all schools are budgeted and supervised by the Ministry of Education, the orthodox sector and another 4% of the schools are allowed to raise additional funding and change parts of the national curriculum. The parents play a modest formal part as they are chosen every year for membership of the parents' association, which mainly helps the school principal with extracurricular activities and has little influence on pedagogical and administrative issues, at least by law.

From 1948, with the establishment of the State of Israel, the role of the Israeli principal has remained basically the same and is composed of teaching hours with the addition of management hours (Ministry of Education, 1975). The role definition was unclear and was charged with responsibility without adequate authority. Since 2007 a radical change has occurred, with the establishment of a National Centre for Principal Training and Professional Development, which took upon itself the mission of improving the Israeli educational system through the activation of school principals as a leading professional community (Avney Rosha Vision, 2011).

School Selection Procedure

The five successful school principals chosen for this study were selected according to the three criteria of school success in Israel: (1) high academic achievement, (2) low rate of violence, vandalism, and dropout, and (3) the good reputation of the school and the principal. The selection operated in two steps: first, by obtaining recommendations from the Ministry of Education, municipality officials, and other principals, a list of schools that met these criteria was compiled. Second, five schools that were mentioned several times and presented different contexts of size, level, and heterogeneous student population were chosen. The schools' details are presented in Table 1.

It is important to note that the study of only five cases weakens the generalization of the study results. But, as usually the case in the qualitative method, the merit of this study consequence is for the readers to say (Eisenhardt, 1989).

Table 1. The Five Israeli Schools, Population, and Principals' Characteristics.

School	Population	Principal	Principal's Experience
Rural high school, high school + boarding school, 1,500 students	7–12 grade (age 13–18), Medium–high SES	General manager – male, biology teacher	20 years
		School manager – male, history teacher	6 years
Comprehensive religious high school, 1,500 students	7–12 grade, mixed SES, heterogeneous: religious, newcomers	Female, history teacher	6 years
Comprehensive high school, 1,200 students	7–12 grade, medium SES	Female, biology teacher	14 years
Elementary neighborhood school, 400 students	1–6 grade, Low SES, heterogeneous: newcomers, ethnicity	Female, language teacher	29 years
Elementary magnet school, 530 students	1–6 grade, mixed SES, heterogeneous: Jewish-Arab, newcomers, ethnicity	Female, language teacher	8 years

Data Collection Tools

Following the ISSPP research protocol (Day, 2007), the data collection tools included observations, relevant documentation, semi-structured interviews with the principal, deputy, counselor, school psychologist, superintendent, external agents, and focus groups of 3–6 teachers, 3–6 students, and 3–6 parents. The interviewees were selected in accordance with the principal's recommendation according to their involvement in school improvement, as required by the qualitative method, in which differing experiences, multiple viewpoints, and familiarity with the subject being studied are required for data trustworthiness (Stake, 1995).

The interview protocol consisted of a set of open-ended questions asking informants to describe the school's history and background, indicators for school success, the relationships the school has with its environment, the role of the principal in establishing and managing these relationships, the influence of external stakeholders on the school, other internal and external factors that affect school success, and outcomes indicating this success.

Data Collection Process

The data was collected through 2009 by a research team consisting of five researchers, working in teams of 2–3. The teams visited the schools 3–5 times, spending about 60 person-hours per school. A typical interview lasted about 90 minutes and was conducted by one researcher. Observations on meetings and staff teamwork were conducted by two researchers. All raw materials were transcribed.

At the half-way point of collecting the data, preliminary ideas were formed and checked with the schools leaders. Additional data was collected according to the interviewee feedback and further questions arose during the process.

Data Analysis

Following Eisenhardt's (1989) suggestion, a within-case analysis was first conducted for each case. Each research team analyzed all reported events that meet RM criteria: collaboration relation, on individual basis, that emerged at the interactive process (Palmatier et al., 2006; Sheth & Parvatiyar, 2002). Then the events were compared to find similarities and differences and suggest the "ideal type" of RM at this school. This analysis was disseminated to other researchers for clarification. In the second phase, a cross-case analysis was done between the five cases, to validate the different "ideal types" with each other and against the overall RM inventory (Eisenhardt, 1989).

To do this, a constant comparative method was used, as suggested by Glaser and Strauss (1967), and "open coding" suggested by Strauss and Corbin (1990). The analysis process was based on the two analytical procedures of making comparisons and asking questions regarding the phenomenon's dimensions, levels, and its relationship with others. Incompatibility and contradiction were resolved by going back to the original interviews and the raw data, and by consulting with researchers from the research team.

SUCCESSFUL SCHOOL PRINCIPAL AND RM

The study's main finding is that successful school principals, like Molière's protagonist who has unwittingly been speaking prose all his life,[1] create RM in their ongoing work without terming it this way. The ways that they are doing it are revealed in the next part according to the research questions.

The first research question was who the successful school principals' main partners are. It was found that the main partners mentioned by all five principals as central for RM are parents, education authorities (Ministry of Education, municipality and school network[2]), and stakeholders.[3] It is important to note, however, that not all the work relations with these partners were RM, for two reasons. First, the school is constantly and formally involved in working relations with these partners for its everyday performance, so no marketing is needed. Second, these partners are organizations (e.g., Ministry of Education) or groups (e.g., parents) that on average suit other marketing activities (such as brochures and open days), which are not identified as RM (Palmatier et al., 2006). So, how and when do these relations become RM?

For answer this question, the data was analyzed according to the characteristics and circumstances of RM: interactive, collaborative, and grounded in one-to-one relations (Palmatier et al., 2006), and an ''ideal type'' – a model that emphasizes certain elements common to most interactions – was outlined. The ideal type contains three elements: establishment event, enabling conditions, and outcomes and additional consequences.

The first element is *establishment event*. This is a key event that caught the principal's attention and signals that the identified partner conveys opportunity for the school. These kinds of events can come in many shapes and sizes, so it is hard to define it in advance. But the ability to identify the right events is certainly dependent on the principal's experience and expertise to notice the figure from the background, so to speak. As one of the principals relates: ''In the first, second, third year, you take everything very personally … after four-five years, you understand where things are coming from, you anticipate it and can cope with everything.'' The presence of the event is necessary for the beginning of the RM, but not enough without the next element.

The second element is the *enabling conditions* of discovering mutual interest and clarifying norms of behavior. RM is defined as a win–win situation, when the long-lasting relations serve both parties (Sheth & Parvatiyar, 2002). However, since the work of sociologist Robert Merton, we know that in a role-set there are always different views due to the different status of the members in the role-set (Merton, 1968). The principal's mission, then, is to bridge these singular views by emphasizing the common goal. In addition to that, to maintain these relations long enough, the principal has to see that certain norms become obvious, or at least agreed upon. Otherwise, these relations depend too much on a personality or situational conditions that would make them too vulnerable. But even after the first two elements have been set, establishing and maintaining RM is not complete without the third part of the outcomes.

The third element is the positive *outcomes* of the RM, which reinforce them over and over again. Without positive outcome, the RM which is needed for achieving the mutual interest in the first place will probably fall apart. RM's outcomes could be happy students, satisfied parent, scare resources from cooperative stakeholders or a proud mayor-all contribute directly to school success. And since nothing succeeds like success, good RM brings about additional consequences such as commitment, trust, and loyalty. In this way, RM contributes to those who create and maintain them as well as to the school as a whole. This "ideal type" of RM managed by successful school principals that has been described so far, is presented in Fig. 1, and further demonstrated below.

Establishment event

A partner becomes an associate for RM when a special event occurs that disrupts and/or challenges the ongoing routine, either as a problem or an opportunity. As a problem, the events are usually on an individual

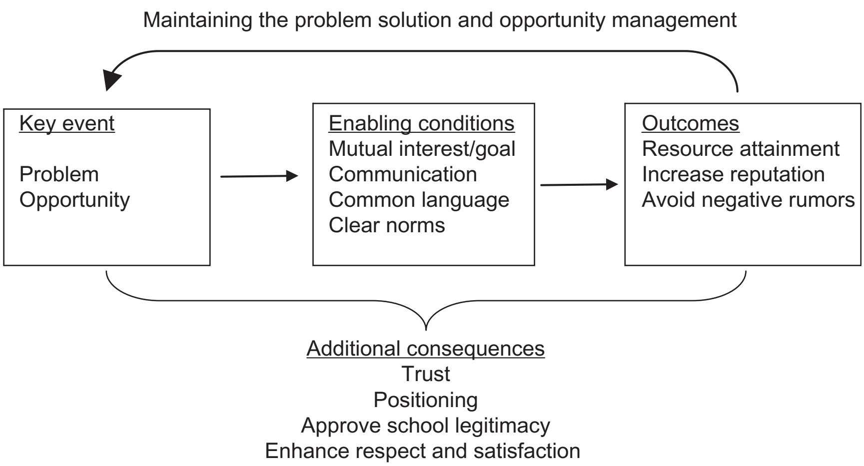

Fig. 1. Ideal Type of Relationship Marketing.

basis: when parents have a problem with their child, a budget issue requires special attention by the authority's treasurer, or the NGO's instructor encounters difficulties. As an opportunity, it is usually the successful principal who learns about a new prospect of obtaining additional resources for the school, and personally acts to establish RM with the new partner. If some enabling conditions exist, these relations meet the criteria of RM, that is, increasing partners' commitment on a continuous basis by offering better value at a reduced price (Sheth & Parvatiyar, 2002). This commitment results from changing the partners' point of view to see the potential benefits of the RM to all of them.

Enabling conditions

The principal and the partner have to identify a mutual interest or goal, create a channel of communication, develop a common language, and maintain clear norms of behavior. For example, one of the high school principals describes his way of dealing with one of the teachers:

> We have a teacher that parents complain about all the time … ten years ago they tried to fire her but failed … so eventually I tried different methods-to hug and support her. Maybe it reduces her behavior that results from fear and stress … For years I have been working with her this way, and am getting a lot more from her than before … she came in her own time to help the student and give her soul.

Usually RM is directed toward outside partners, but this story demonstrates how a different attitude taken by the principal, which emphasized the common interest of the principal and the teacher, evokes different behavior in the teacher. Another principal indicated how important it is to speak with the parents in their own language:

> In the parents committee, I try to use simple language for those that do not understand … You can see it is embarrassing for them to say "I didn't understand" when they miss a word or don't get the idea … You cannot give an answer if you don't know the specific nuances of each group … We have Arabs, newcomers from the Caucasus, Ethiopia … You have to be familiar with them and it is a lot of work.

The parent representatives are important partners for the principal, and finding common language is essential for lasting RM. When these conditions of mutual interests, channels of communication, common language, and clear norms are maintained, the RM leads to several results and outcomes.

Outcomes

The direct results of the RM are related to the goals of these relationships in the first place: to solve a problem or to make the most of an opportunity the successful school principal encountered. What makes an occasional relation into RM is the recognition of its continuous values. When out of 500 students at the school for example, some have problems that bring their parents to the principal's office (the working relations with the parents are managed regularly by the teachers), it is not a simple problem and has the potential to spread quickly. In such a case, continuously establishing RM with the parents is important not only for managing the problem, but for avoiding negative rumors and a bad reputation that angry parents can cause the school.

Another example of the RM potential is the case of introducing a new program into the school. In this case, the principal has to see if it fulfills its promise and helps the school to achieve its goals, or waste school resources for nothing. If successful, the school gains additional resources and enhances both its success and reputation. If it fails, the new program can waste valuable resources of time, money, and energy that can damage the school. The ongoing process of RM maintenance may lead to additional and sometimes unexpected consequences.

Additional consequences

Cooperation, commitment, trust, and loyalty are considered to be key variables and outcomes of RM (Morgan & Hunt, 1994; Palmatier et al., 2006). It is also true in the current model, but not as a *final causality* – the goal one wants to reach (Van de Ven & Poole, 2005), but as additional outcomes that are grounded in the effective way whereby the school's and the partners' needs are met, and, in turn, enhance these relations. The following stories demonstrate this model of RM with parents, authorities, and stakeholders.

Parents

As mentioned, the parents are very important partners for RM. The following two stories emphasize different bases for establishing RM with parents:

The Abusive Mother
In one elementary school the principal told about a seven-year-old girl who was continually late for school in the morning. Her mother was called to

meet the principals and was asked to confirm that her daughter would come on time. But the girl continued to arrive late. One morning, the principal lost her patience and went to the child's home (which was close to the school) to speak to the mother. The mother promised to do better and the principal left. But in the stairwell the principal heard the mother smacking the girl to punish her. The principal went back and threatened the mother that if she ever heard about her beating the girl again, she would call the police. After that the girl no longer arrived late for school, and the mother cooperated with the staff and displayed respect to the principal and the school.

In this case, a problem (mother smacking the girl) was identified by the principal as an event for RM establishment, at least for the sake of the girl. The principal could have ignored what she heard, and no one would have blamed her. But by opening up the situation, focusing on the girl as the mutual interest, and setting rules of behavior (threatening to call the police), the principal established a long respectful relation, which helped the girl and transformed the mother from apathetic to cooperative. The next story also demonstrates how hostile parents can become cooperative and supportive of the school.

Religious–Secular Conflict

In Israel, the elementary schools in the Jewish secular sector usually hold a "Bible party" in the second grade, at which each student is given his/her first Bible. In one of the elementary schools studied, this was usually held during a school trip to national and historical sites, but in 2009 the teachers in charge decided to hold it in a synagogue. Several secular parents viewed this as a coercive religious act, became angry, and wrote harsh letters. The principal called a meeting to resolve the problem. Although the parents did not get what they wanted, they were given sufficient explanations and respect to enlist their cooperation. As one mother related: "I have never been in a meeting where such harsh words were spoken and from which I left with such a good feeling. There had never been such a thing … They (the principal and school staff) took it seriously."

One of the most important goals of RM, especially in public organizations such as a school, is to gain loyalty and legitimacy of the environment, which it depends upon for its resources and survival (Meyer & Rowan, 1992). The above story demonstrated how the principal enhanced parent loyalty and legitimacy by creating RM in three acts: first, she (the principal) recognized the key event in which the teacher's decision stirred up the parents against the school. Second, she established enabling conditions by calling a meeting in which mutual interests were set (providing a good

"Bible party" for the students), norms were clarified (teachers make decisions and parents' voice is heard), and communication channels were opened (meeting instead of letters). As a consequence, parental trust and loyalty were increased. Schools create RM with additional partners, as is demonstrated next.

Authorities

One of the high schools studied belongs to an organization (network) that manages all the school's financial issues, and expects the principals to maintain very accurate bookkeeping. This required the principal to be in a constant working relationship with the network's officials. If she reported on time, kept balanced accounts, and managed to enlist more students and donations, she received credit in the network organization. Under these conditions, the principal invested time and energy in creating trust with the network, and explains:

> I have a very good relationship with the woman in charge, and if she has surplus funds, she gives them to me. It could be that in October there is nothing and a month later ten thousand dollars suddenly arrives.

The principal exemplifies the results of the RM she established with "the woman in charge" by which she gets more money than she plans. This principal indicated that it took her several years of coaching to learn how to do it, but after a rebuke call from the network when she deviated from the budget (key event), and meeting with the person in charge (enabling conditions), today she has not only got the money (outcome), but also has a credit and a good reputation in the network administration (additional consequences). RM was also found between the successful school principal and the school's stakeholders.

Stakeholders

All the principals interviewed mention the important part stakeholders play in the school, especially regarding budget cuts, and the increased pressure for high achievement. They all spend time with donors to raise money for a special group of students (newcomers, students with learning disabilities, etc.), and a variety of organizations offering different pedagogical programs.

But after the first contact, the principals carefully check the adjustment of the program to the school.

One high school principal relates how she had to terminate a university professor's program since it didn't deliver, and others had to terminate certain volunteers because they were "just hanging around without any noticeable contribution." In a positive example, an elementary school principal relates:

> We have a big population of Ethiopian newcomers, and some years ago I introduced a program for them, but the intervening organization wanted to appoint the instructors. I said, "No way – If you want me to operate the program, I decide on the instructors." I applied to a nearby college where I know the people and trust them to do the job properly … I called some professionals and asked them to develop a program for our population. The reading-writing program developed here is now all over Israel and is considered the best of its kind.

To sum up, all these stories have the same narrative: a problem or opportunity catches the principal's attention, and by clarifying the mutual interest, opening communication channels, and setting clear norms, RM emerges and brings about the desired outcomes (legitimacy and resources) and additional consequences of trust and loyalty that all together promote school success and positioning in its environment. These RM not only lead to solving the problem or gaining a contribution from the opportunity, but also result in an enhanced reputation and avoid negative rumors, and additionally increase school partners' trust, respect, and satisfaction.

The third research question is how RM contributes to school success. The answer depends on the definition of school success, which in different contexts means different things (Leithwood & Day, 2007). But if we only take the criterion of good reputation as one of the definitions of a school's success, a significant contribution was found. Being a socialization agent and a servant of so many masters, the ability of the school to achieve legitimacy and resources depends on its ability to get along with all its partners (Rowan & Miskel, 1999).

As was found, one of the successful school principals' partners for RM is the parents, and good RM promotes parents' satisfaction and loyalty. This finding, supported by a study conducted in Taiwan with 769 parents, found that school–parent communication has the strongest effect on enhancing a positive school image, and school image has a strong influence on parents' loyalty (Li & Hung, 2009). RM makes a direct contribution to school image and reputation. Its significance for other success factors such as students' achievement, low dropout and violence rate, and good climate is probably indirect, and further study can contribute in determining this.

DISCUSSION

This chapter began by puzzling about the gap between school marketing theory-of-action and school marketing theory-in-use, suggesting that RM can bridges this gap. As was found, successful school principals constantly engaged in weaving RM, not because they learned it in a principal preparation program or because they know to call it by the right name, but because they know how to solve a problem or take advantage of emergent opportunities. Like a one-year-old child that learns to walk because he/she wants to reach places, thus successful school principals learn to do RM because they want to achieve goals and reach their targets.

It also found that the RM establishment process takes time. The five successful school principals in this study are all experienced (at least 8 years of principalship) and were keen to point out the time it took them to learn how, when and with whom to establish meaningful relationship (RM) and what would have been the outcome if they failed to do so. What it takes to master this skill is a subject for a further study. Based on this study, however, the ability of reflection and constantly studying from one's own experience, seems to be a good place to start searching.

These findings raise additional interesting questions, which guide the next part of the discussion. First, why is it important to use the term "RM"? In other words, what added value does the concept of RM add to the educational leadership literature? Using the concepts and variables of RM for analyzing the stories told by the principals reveals that successful school principals do RM but explain it differently. While their theory-of-action (Argyris & Schon, 1996) was about solving a problem or seizing opportunities, their theory-in-use is about creating RM out of it. In other words, they understand the importance of every partner, and the potential damage of a problem that is not properly dealt with. When dealing with a parent, for example, the principal can just give the parent what he wants for creating satisfaction and achieving temporary settlement, or create RM and thus transform an angry parent into a fan of the school. As found in the business field too, solving problems and resolving disagreements has the greatest impact on RM establishment (Palmatier et al., 2006). It seems that using the right term of RM will help principals to better understand what they are actually doing, and maybe shorten the learning time and make it more efficient.

RM not only helps in building a good reputation, but also to avoid rumors and smears that, if they occur, would take a great deal of time and energy to rectify, if rectification were at all possible. If this is true, allegedly all schools' relations should be RM, and all school staff should be involved in maintaining them. This leads to the second and third questions: does every partner become an associate for RM? And does every school member become a RM creator?

For the second question, it is obvious that a principal cannot create and maintain RM with all the school's partners: all parents (of between 400 and 1,500 students in the schools studied), all the officials, and all the stakeholders. From the results, it seems that the principal takes care of the extreme cases, or those that he/she found to have the most harmful or helpful potential. This study did not compare successful school principals with regular principals, but it could be assumed that this makes a difference – the ability to identify the right cases for investing in RM establishment. Further study is called for in exploring this issue.

As for the third question – as mentioned earlier, RM are at best when they are interactive, collaborative, and grounded in one-to-one relations (Palmatier et al., 2006; Sheth & Parvatiyar, 2002). Even so, it is not the principal's task alone, and if it becomes a school habit, it can spread to the school staff who would follow the principal's model. As has been found in many other studies (Day, et al., 2009; Leithwood & Jantzi, 2008), good leaders serve as a role model for school staff. Thus, following the principal's lead, each home-room teacher[4] who is accountable for good relations with the parents of his/her students, and each member of the school management team (deputy, coordinators) who helps to handle school relations with authorities and stakeholders, would have to choose the right case for RM establishment, and thus support the school's good reputation in its community. Further study can help to clarify such parallelism between the principal and his/her staff.

Fourthly, if RM is a sort of personalization, a co-production where each consumer shapes the service from below (Hartley, 2008), how does RM differ from work relations? Or in our case, in what way do teacher–parent relations, for example, develop into RM? There are two opposite answers to this question. First, teacher–parent relations become RM when they meet three unique criteria: a one-to-one relationship, an interactive process, and a value-added activity through collaboration (Sheth & Parvatiyar, 2002). This means that not every letter written to a parent creates RM, but only in the case in which the letter is part of an ongoing collaboration that empowers parent and teacher alike. Second, and conversely, RM even at its best might be instrumental in its purpose (Hartley, 2008). In other words, it helps parent and student to navigate their personalized way through the complex educational system at school, but still serve the system more than the parent, without changing the un-egalitarian power relations. And perhaps this is the secret of RM – although it enhances the school's positioning in its community, it also empowers school partners in a win–win situation.

This study has some theoretical contributions. First, it adds RM establishment as an additional attribute to those found in the literature to characterize successful school principals. Attributes like the ability to infuse meaning to actions, responsiveness to the contexts, building collaborative culture, and developing productive working relations with outside partners (Leithwood & Day, 2007; Leithwood, Harris, & Hopkins, 2008). Second, it was found that trust and communication are not only key factors in maintaining RM (Morgan & Hunt, 1994), but a side-effect of good conflict management.

Finally, this study can bridge the gap between school marketing theory-of-action and school marketing theory-in-use by integrating the marketing philosophical view with marketing as a function. In the way represented in this study, using RM to achieve the objectives of both parties, as defined by the philosophical view (McDonald, 1989), is also using RM to elicit a favorable response from potential partners, as defined in the functional definition (Drysdale, 2001, p. 2). It makes RM philosophy very functional: not a win–lose situation where manipulation is the name of the game, but the rebirth of marketing practices of the preindustrial age, when producers and users engaged in a continuous process of value creation (Sheth & Parvatiyar, 2002), and returning emotion and re-enchanting into school relations (Hartley, 2008).

LESSONS LEARNED

The main lesson drawn from this study is that establishing RM should not be hard work. On the contrary, it could be a side-effect of good management. It is not about charismatic or transformational leadership (Leithwood & Sun, 2009), and not even about instructional or distributed leadership (Harris, 2008). It is about decent and caring everyday activities that see the partner's needs no less than those of the school, are attentive to those needs, and meet them in ways that empower all partners.

Perhaps the main idea of RM is also an important lesson – it is not a win–lose situation. A school, as an organization that lies in the middle of so many obscure and sometimes contradictory expectations, which has to operate with so many partners to attain so many goals, must maintain good relations with its partners. Viewing these relations as RM, equipping principals with an additional point of view might help to improve their schools.

NOTES

1. Molière (Jean-Baptiste Poquelin), *Le Bourgeois gentilhomme* [The Bourgeois Gentleman], 1670.
2. In Israel, some of the high schools organized in public networks that are administrative in nature are subordinate to Ministry of Education regulations but are managed independently.
3. In Israel, due to years of privatization and budget cuts, many NGOs and intervention organizations entered the educational system, up to an average of more than three such organizations in each school (Vinhber, Ben Nun, & Shifman, 2008).
4. In Israel, every class has a home-room teacher who is in charge of all academic and social aspects of his/her students, treats them as an educational group; presents the class before the principal and other teachers; and nurtures strong ties with the parents (Ministry of Education, 1975).

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SECTION THREE
NEW DIRECTIONS IN THE STUDY OF EDUCATIONAL MARKETING

A CONCEPTUAL FRAMEWORK FOR CLASSIFYING AND UNDERSTANDING RELATIONSHIP MARKETING WITHIN SCHOOLS

Hsiao-Pei (Sophie) Yang and Julie Robson

ABSTRACT

Purpose – *The purpose of this chapter is to develop a conceptual framework that provides insight and aids understanding of the complex array of relationships schools have with individuals, organizations, and other entities.*

Design/methodology/approach – *The conceptual framework is drawn from the relationship marketing (RM) literature and applied to a school context in the United Kingdom. In doing so, it provides a simplified representation of the environment in which schools operate and a valuable classification structure for the many different relationships a school has. This framework will be of benefit to both academics and practitioners.*

Findings – *The authors find that the relationships schools have can be classified within the conceptual framework. The framework aids understanding of the different relationships and provides insights into how these*

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relationships can be developed and where value can be added. Application of the framework also highlights the complex nature of the relationships schools can have with others and the need to manage those relationships well.

Research implications – *The framework developed in this chapter is conceptual and needs to be tested empirically.*

Originality/value – *This chapter responds to the call from Oplatka and Hemsley-Brown (2004) to provide further research into the area of RM in the context of schools. It adds value by drawing together various aspects of RM, providing an analysis of their relevance to educational services marketing and identifying and applying a conceptual framework which classifies the relationships schools have with others. This chapter provides important insights for those within schools who are responsible for the management of relationships with their organization and for others seeking to foster greater engagement with schools.*

INTRODUCTION

Over the past 25 years, successive governments have introduced a number of changes to the school education system in the United Kingdom. For England and Wales, the changes began in 1988 with the Education Reform Act and have continued more recently with the Academies Act in 2010. As a result, schools can now become Academies, thereby gaining more freedom over their own curriculum and admissions. In addition, new competition has been made possible by the introduction of free schools that can be created by private organizations and groups of parents and teachers. Such developments have significantly changed the landscape in which schools operate, bringing marketization and privatization to the school sector (Whitty & Power, 2000).

Although there were initially debates on the appropriateness of marketing for educational institutions, such as schools (Harvey & Busher, 1996), schools were advised to adopt marketing concepts and practices in order to continue to attract students in this new competitive market (Foskett, 1998; Levin, 2001; Oplatka, 2002). Marketing activity within schools is, however, relatively new when compared to sectors such as goods and other service industries. As marketing in schools has not yet become fully mature, many gaps identified by Oplatka and Hemsley-Brown (2004) in their synthesis of research on educational marketing practice can still be considered to apply today. While subsequent research has helped to close some of the gaps identified, more research and guidance for marketing by schools is still required. Relationship marketing (RM) is one example where further work is still required, and Oplatka as Hemsley-Brown (2004, p. 393) concluded:

> Although forms of RM have already been observed in schools (Bell, 1999; Oplatka, Hemsley-Brown, & Foskett, 2002), a much more in-depth research of RM is needed in order to understand this approach to marketing in the context of schooling. Subsequent research should begin to inquire into the encounters of parents and children with staff, the issue of loyalty to the school, the specific breakthrough strategies for retaining children, the nature of the exchange process in RM, classifications of marketing relationships, strategies of RM, how schools establish trust among parents, and antecedents of RM in schools.

Despite this call for more in-depth research on RM in the context of schooling, most recent work on RM in the education sector has focused on colleges and/or universities (e.g., Vauterin, Linnanen, & Marttila, 2011) and in particular universities in an international context (e.g., Heffernan & Poole, 2005). RM in the context of schools has so far received little attention. In addition, although some researchers have inquired into RM in the education sector (e.g., Helgesen, 2008), the majority have focused on the relationships between educational institutions and their students rather than looking into the complex relationships schools have with individuals, organizations, and other entities as external stakeholders. Our understanding of RM in the context of a school continues to be incomplete, especially in managing the relationships with different types of business organizations. In particular, we have yet to identify a classification framework (as identified by Oplatka & Hemsley-Brown, 2004) to help us understand the portfolio of different relationships schools have. Yet it is only by understanding the range and type of relationships that schools have that we can then begin to understand how to manage and develop them effectively. We believe that managing external relationships better than the competition can help schools differentiate their education services, as product/service and price alone are less important differentiators for organizations nowadays, while the core differentiators organizations can gain through better relationships with business-to-business (B2B) customers include better service support, increased personal interaction, superior provider's know-how, and better service quality (Ulaga & Eggert, 2006), which all help create value for business customers apart from relying on the existing education services schools currently offer.

This chapter seeks to answer the call by Oplatka and Hemsley-Brown (2004) to add to our understanding of RM in schools and specifically to provide a classification framework of the relationships schools have. The approach taken is essentially conceptual, in that a framework is developed from the RM literature and applied theoretically to schools. The context is the UK education system and specifically state schools in England and Wales. This chapter therefore contributes not only conceptually to the general understanding of relationship management within schools, but also seeks to provide a classification framework to provide structure and help schools understand and manage the relationships they have.

Schools do have a wide and complex variety of relationships. Such relationships are not confined to their customers, that is, the students, but also include relationships with other stakeholders (Grönroos, 1994), for example, suppliers of business services, local community groups, and sponsors/donors. The total number and type of relationships schools have will vary by school, by context, and over time. Fig. 1 identifies the main relationships that exist for a school.

These relationships are both with consumers, that is, those that exist between a school and an individual (e.g., a pupil or parent) and are traditionally referred to as business-to-consumer (B2C) relationships, or with a business or organization, that is, those that exist between two

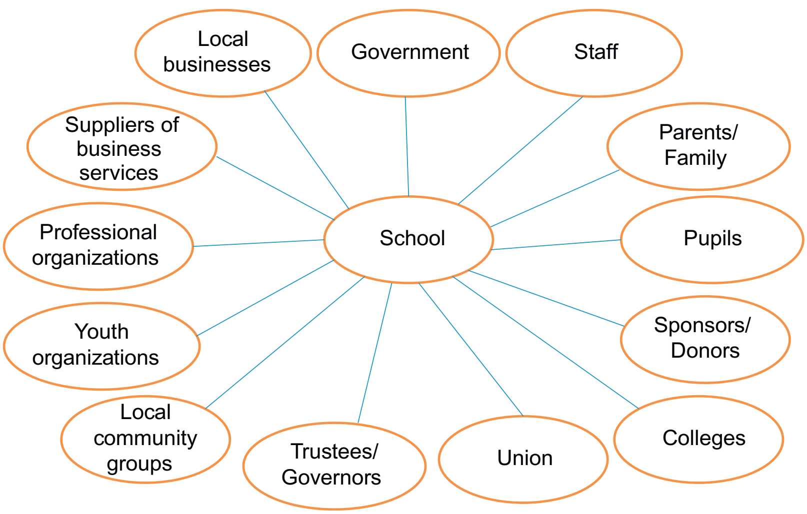

Fig. 1. Examples of the Different Relationships Schools have with Others.

organizations (e.g., a school and a local business or government); these are typically called B2B relationships. Having identified the relationships a school may have provides an appreciation of the complexity of the situation, but does little to help schools to manage those relationships. In order to do this, schools require a classification framework that can provide insight and aid our understanding of the relationships schools have with individuals, organizations, and other entities. Schools can then identify priorities, address the needs of those relationships, and, where possible, seek to create value for B2B customers.

Before discussing the complex array of relationships schools have in detail, we will look into previous studies done in the field of RM in the education sector, followed by the school context.

LITERATURE REVIEW

In this section, the key themes of RM and creating value through RM will be introduced before moving on to consider both in the specific school context.

Relationship Marketing

RM is a well-established concept in the marketing literature. It is believed that managing external relationships well can provide an organization with a competitive advantage (Berry, 1995; Morgan & Hunt, 1994; Srivastava, Fahey, & Christensen, 2001).

It is now almost three decades since Berry (1983, p. 25) first used the term and defined RM as "attracting, maintaining, and enhancing customer relationships." Berry's definition provided the foundation upon which most subsequent definitions were built. For example, Christopher, Payner, and Ballantayne (1991, p. 4) defined the function of RM as "getting and keeping customers" while Morgan and Hunt (1994) added the importance of trust, cooperation, and shared values in maintaining a successful relationship. Today there is no one universally agreed definition of RM in either the B2C or B2B context; however, one that is widely accepted is provided by Grönroos, who suggested:

> Relationship Marketing is to identify and establish, maintain and enhance and when necessary also to terminate relationships with customers and other stakeholders, at a profit, so that the objectives of all parties are met, and that this is done by a mutual exchange and fulfilment of promises. (Grönroos, 1994, p. 9)

This broad definition has been selected as the basis for this chapter, as it defines the relationship as being with "customers and other stakeholders," thereby accommodating the wide range of relationships schools can have with customers as consumers (B2C) or businesses (B2B) as well as stakeholders who may, for example, be suppliers or partners. It also recognizes that the need for "profit" is explicitly included in this definition. Although schools are categorized as "not-for-profit" organizations, they are increasingly looking to additional revenue streams that can provide a surplus and fund core activities, so the need for profit, or a "surplus," should be recognized.

RM focuses on a mutual exchange and fulfillment of promises between the stakeholders and an organization (Grönroos, 1994; Harker, 1999). RM is therefore not only about gaining new customers, but about developing loyalty from those that an organization has previously expensively gained. Organizations need to see a relationship from the "customers' perspective" and understand what they seek in a relationship (Palmer, 1994, p. 573). Therefore, organizations adopting RM should focus on the process *after* the moment of exchange through maintaining and retaining customers, in order to create mutual benefits to all parties through the long-term relationship (Grönroos, 2011; Gummesson, 1994; Harker & Egan, 2006). As value creation is a key concept in B2B RM (see, e.g., Morgan & Hunt, 1994; Ulaga, 2003), value creation will be discussed next.

Value Creation

Value creation is a basic constituent of RM (Gummesson, 2004; Morgan & Hunt, 1994; Walter, Ritter, & Gemünden 2001) and the ability to provide superior value to business customers is a prerequisite for organizations when trying to establish and maintain long-term relationships (Ravald & Grönroos, 1996; Ulaga, 2003).

In order to understand value creation, it is important to define the term "value" first. Zeithaml (1988, p. 14) defined customer-perceived value as "the consumer's overall assessment of the utility of a product based on a perception of what is received and what is given." Value-adding or value-creating strategies focus on adding value to the core product or service a supplier provides, such as an additional product feature or a supporting service (Ravald & Grönroos, 1996). Only when organizations are customer-centric do they know how to create value for their customers, and if a relationship does not create value for the organization's business customers, the relationship between both parties will not last. Hence, it is argued that the nature of value creation is demonstrated through "reciprocal service provision" and is a "networked, interdependent, and cocreative" process between the suppliers and customers (Vargo, 2009, p. 377).

The concept of value creation is widely discussed in B2B markets (Anderson & Narus, 1995; Parasuraman, 1997; Walter & Ritter, 2003) and is considered fundamental due to the predominant role that functionality, or performance, plays in business markets (Anderson & Narus, 1999, p. 5). The value creation between firms is developed through associating and interaction with other parties, because suppliers need to offer value to the customer but also to gain benefits from the customer at the same time (Walter & Ritter, 2003). Businesses anticipate economic benefits from their relationships, either immediately from the relationship or from the impact of the relationship on future business or on other connected relationships (Anderson, Håkansson, & Johanson, 1994; Håkansson & Johanson, 1993; Walter & Ritter, 2003; Walter et al., 2001). Although schools are "not-for-profit" organizations, additional revenue streams that provide a surplus are still needed.

More specifically, when applying the value-creation concept in the school context, schools should aim at being "value facilitators" to assist their business customers, who are "value creators," to perform better by satisfying the needs of their customers further (Grönroos, 2008). For example, one party of the B2B relationship a school has is with the government. A school can be a better "value facilitator" to the government it partners with by advising the government to provide any nonexisting or additional education service features that would benefit the general public whom the government tries to serve as a whole. To be able to provide timely and sensible advice to government or any other stakeholders, schools must have a close "networked" relationship with not only B2B but also B2C customers, such as students and parents, in order to identify and respond to their needs. Therefore, we argue that schools must understand the types of relationships they have before managing them, followed by meeting the unmet needs through working with other B2B customers and/or providing additional service features.

In the value creation through B2B RM, trust and commitment are often discussed in the literature (i.e., Gounaris, 2005; Morgan & Hunt, 1994; Walter & Ritter, 2003). For example, Gounaris (2005) looked into relationships between trust and commitment, suggesting that trust and commitment are the two important elements that cause corporate clients to uphold a relationship with their supplier, while trust precedes the development of commitment. Commitment is the desire for continuity manifested by the willingness to invest resources into a relationship (Gounaris, 2005), and it is not only an essential ingredient for successful long-term customer relationships (Morgan & Hunt, 1994), but also drives the value-creation process in business relationships (Walter & Ritter, 2003). Essentially, commitment is not only an antecedent of customer satisfaction (Selnes, 1998), but also a consequence followed by customer satisfaction (Kelley & Davis, 1994). Hence, in managing B2B relationships, schools need to see from the perspectives of their business customers in order to increase trust and commitment in the relationships, while the management of schools should acknowledge that commitment-building is based on continuously satisfying customers, which is a long-term goal and might not have instant results.

RELATIONSHIP MARKETING AND VALUE CREATING IN SCHOOLS

Although RM concepts have been discussed in a school context (Foskett, 1999; Oplatka & Hemsley-Brown, 2004), the majority have examined RM in a further education (FE) (Klassen, 2002; Trim, 2003) or a higher education (HE) setting (Arnett, German, & Hunt, 2003; Binsardi & Ekwulugo, 2003; Hemsley-Brown & Oplatka, 2006; Mazzarol, 1998; Rowley, 2003). In addition, the majority have focused on the benefits flowing from RM practices, processes, and strategies instead of applying RM in the education sector. Relevant studies of RM done in the education sector will be discussed next, followed by a section focusing on applying concepts to the school sector in particular.

Some studies have applied RM in a B2C context and explained the benefits of applying RM (Arnett et al., 2003; Helgesen, 2008). For example, in an HE context, Arnett et al. (2003) discovered that the benefits of RM practices include maintaining university prestige and enhancing university identity. They suggested universities should build long-term relationships with their students by increasing student involvement in university activities during the time of study through sports or student union associations. Moreover, they confirmed that the outcomes of such long-term relationships between universities and students encouraged graduates to promote the university to others via word-of-mouth and increased the possibilities of donations.

Apart from enhancing the prestige and identity of an educational institution, another benefit of B2C RM is in student retention. In an HE context, Helgesen (2008) suggested universities should adopt an RM approach to improve student retention by creating value for students. The value-creation process should be an ongoing process over the students' lifetime, while surveys with students were the suggested tools to analyze and identify approaches needed to deliver values and increase loyalty for students (Helgesen, 2008). It is argued that, when the management of universities understands students' needs, followed by allocating resources to activities that are important to students, it increased the value of HE services offered to students. On the other hand, Rowley (2003) went beyond discussing the benefits of B2C RM by proposing a Relationship Life Cycle framework to HE and FE in relationship management (Rowley, 2003, p. 251), which improved student retention and enhanced student loyalty and commitment. However, the findings of both Helgesen (2008) and Rowley (2003) were limited to the B2C context. As this chapter focuses on the B2B aspect of RM instead of B2C, the studies on B2B RM will be discussed next.

Similarly to the B2C RM studies that were identified in the previous section, studies in the field of B2B RM have also focused on the benefits of adopting B2B RM, instead of approaches for educational institutions to apply RM in a B2B context. The literature suggested the benefits of adopting B2B RM in the education sector include better meeting of customer expectations, attracting more customers (Trim, 2003), increasing customer satisfaction, facilitating positive word-of-mouth communication (Oplatka et al., 2002), enhancing service features, strengthening customer loyalty (Mazzarol, 1998), building trust and commitment (Heffernan & Poole, 2005), and linking mission more firmly to the marketing situations (Foskett, 1999). However, the only two studies that applied B2B RM concepts in the education sector suggested relationship-building approaches such as using websites of educational institutions (Klassen, 2002) or building brand communities (McAlexander, Koenig, & Schouten, 2004). We will discuss those B2B RM concepts next.

Among educational institutions in HE, FE, and business colleges, one of the earliest studies that referred to RM was Mazzarol (1998) who investigated critical success factors for international education marketing. He pointed out the importance of relationship-building in educational marketing, arguing that education services should develop a lengthy and formal relationship with clients, which strengthens customer loyalty and enhances service features (Mazzarol, 1998, p. 164). Similarly, Trim (2003) studied the strategic marketing approaches by applying RM concepts in establishing partnership arrangements in FE and HE, proposing a "relational" approach. He found the RM approach helped senior academics and administrators to meet the objectives set by senior management, assist the educational institutions to better audit, evaluate, and manage partnership arrangements, provide education to a broader audience, and meet customer expectations better. More precisely, the partnership relationship of educational institutions acted as a catalyst for developing new services, leading to increasing opportunities in income generation (Trim, 2003).

The study of Mazzarol (1998) and Trim (2003) used FE and HE as examples, while RM was much less discussed in school marketing. Some exceptions were the work of Foskett (1999) and Oplatka et al. (2002). Foskett (1999) first discussed the importance of managing external relations for both schools and colleges, suggesting the marketing strategy of an educational institution should link to managing its external relations and be driven by its interactions with the external environments. He argued that the management of external relations would help educational institutions link their missions more firmly to their marketing situations (Foskett, 1999, p. 47). More from the internal marketing perspective of RM, Oplatka et al. (2002) looked into teachers' perspectives in marketing schools and found that teachers supported building and managing good relationships with their pupils. Teachers supported a relationship-based marketing approach rather than just emphasizing "selling" the educational services, as they felt the former approach would increase student satisfaction, leading to positive word-of-mouth communication in the community (2002, p. 185). Leaders of schools were encouraged to involve both academic and nonacademic staff in their RM approach, in order to create value for the education services and survive in the competitive market (Oplatka et al., 2002).

Furthermore, the benefits of applying RM were also applicable in an international context of the education sector. Binsardi and Ekwulugo (2003) investigated international students' perceptions on UK universities, recommending UK universities to adopt a "network" approach by developing and maintaining a strong relationship with various stakeholders and customers in order to succeed in the competitive international education market (2003, p. 319). Moreover, Heffernan and Poole (2005) looked at international education partnerships by using examples of Australian universities, stressing the importance of developing effective communication structures and frameworks, building mutual trust, and encouragement and demonstration of commitment between partners (2005, p. 237). The key success factors for international education partnerships included effective communication, trust, and commitment between both parties (Heffernan & Poole, 2005), which were consistent with the RM literature done in the not-for-profit sectors.

Going beyond discussing the benefits of B2B RM, Klassen (2002) and McAlexander et al. (2004) proposed possible B2B RM approaches for educational institutions. Klassen (2002) applied RM on the website analysis, suggesting HE and FE institutions should use their websites for relationship-building, as very few institutions had been using their websites effectively to strengthen relationships with external stakeholders, including students. In addition, McAlexander et al. (2004) applied RM in HE by suggesting universities should build a brand community that includes all their stakeholders and pursue policies and programs to strengthen the relationships that define the community. They found that establishment of a brand community was particularly effective for improving student experiences, enhancing alumni loyalty and intentions to support the university. After discussing the literature from the B2C and B2B RM, the next section will focus on the value creation in schools.

Value Creation in Schools

As discussed earlier, previous studies in the education sector have focused on B2C RM instead of B2B, and the concept of value added from B2B relationships has been neglected. Although some studies have examined customer-perceived values in the education sector (LeBlanc & Nguyen, 1999; Ledden, Kalafatis, & Samouel, 2007), no existing studies have applied concepts of B2B RM in schools, aimed at creating value for external B2B stakeholders. Studying consumers' perceived values in the education sector, Ledden et al. (2007) looked at the relationship between personal values and the perceived value of HE, suggesting value was a significant determinant of customer satisfaction. Similarly, LeBlanc and Nguyen (1999) examined perceived service value among business school students, explaining the factors affecting students' perceived values on HE service, such as relationship between price and quality or knowledge acquired. However, they did not discuss value creation from a B2B RM perspective.

Due to the lack of previous study, our understanding of B2B RM in a school context continues to be incomplete. Therefore, in the following section, a classification framework will be identified to provide structure and aid our understanding of the different relationships schools have, which will assist schools to understand the types of relationships they have, enhance those relationships and create value.

A CONCEPTUAL FRAMEWORK FOR CLASSIFYING SCHOOL RELATIONSHIPS

As identified earlier, schools have relationships with a wide and varied range of individuals and organizations (Fig. 1). In order to manage these relationships effectively, it can be helpful to classify and group together those relationships that share similar characteristics. This not only allows the importance of the different groups at any one time and in different contexts to be established, but also positions and provides a better understanding of the nature of each individual relationship. The appropriate resource can then be allocated to developing relationships by identifying their needs and creating value.

Trim (2003) identified four groups of stakeholder relationships in the context of FE and HE: internal customers (e.g., academic staff, support staff, and administrators); external B2C customers (e.g., students and governors); external B2B customers (e.g., local authority personnel, central government staff, government agency staff, chamber of commerce personnel, bankers, accountants, auditors, and sponsors); and other wider publics (e.g., students' parents, siblings, shopkeepers, local business personnel, and community groups). Trim's study was one of the few to attempt to identify and classify the different relationships within an educational context; however, the groupings based on B2B and B2C relationship classification provided limited insight, as it did not go beyond the nature of the relationships to explain how best to manage them.

If we look to the wider RM literature for guidance, several authors can be found who have sought to provide frameworks in which to define and classify the different types of relationships organizations have. For example, Christopher et al. (1991) identified six "markets" that organizations should use to direct their marketing activity and formulate marketing plans, namely, customer, referral (i.e., customers recommending the organization to others), supplier, employee recruitment (i.e., potential/future employees), influencer (e.g., finance markets, regulatory markets, and the government), and internal market (i.e., employees). Morgan and Hunt (1994) identified four groups, or partnerships, for relational exchanges: buyer, supplier, internal and lateral partnerships (i.e., competitors and government). Within the not-for-profit sector, Gwin (1990) identified five constituent groups – resource generators, service users, regulators, managers, and staff members.

Clearly there is overlap in these classifications, and indeed Conway and others combined the groupings of Gwin (1990) with those of Morgan and Hunt (1994) in their studies of two not-for-profit sectors, the NHS (Conway & Willcocks, 2000) and subsidized theaters (Conway & Whitelock, 2004). They identified four categories: buyer/service users; suppliers/ resource generators; internal/staff and managers (grouped together); and lateral partnerships/regulators.

In 1990, Gwin suggested that relationships in the for-profit sector were well developed and formalized, whereas those in the not-for-profit sector were not so easily defined or so formal. Accordingly he developed separate frameworks for each. However, Gwin's division between the not-for-profit and for-profit sectors are not so clear-cut in terms of schools. Schools share some of the characteristics of Gwin's for-profit organizations, in that they also have unions and employees (the latter being in contrast to voluntary "staff"), and the role of the community/public is also important in influencing and determining the activities of schools. Indeed, local community and neighborhood were identified as important stakeholders in the work of Simms and Chapleo (2010) in the HE sector and Trim (2003) in the HE and FE sectors. Both unions and the community/public can, however, be accommodated within Conway's conceptual framework. Unions and the community/public would naturally fall within lateral partnerships/regulators as both can, for example, constrain what the school can and cannot do. Employees can be included within the internal/staff category in this context.

Taking the key relationships schools have, as identified in Fig. 1, these can be placed into one of the four quadrants in the framework: supplier/ resource generators; lateral partnerships/regulators; internal/staff and management; and buyer/service users, as depicted in Fig. 2.

Buyer partners – these are the ultimate buyers and in most contexts would be categorized as the customer. In the context of schools, the consumer is different as, although they "consume" the service, they do not directly "pay" for that service as state schools are funded indirectly by tax payers. In this classification framework, "non-revenue generating service users" (Gwin, 1990) is therefore a more appropriate descriptor. Service users can be the student, the parent(s) of the student – who typically choose the school that they wish the student to attend, and the wider family of the student who can influence the school choice decision.

Some of the parents and family of the student may also fall into the "revenue-generating service user" category (Gwin, 1990). Revenue-generating users would return a part or all of the costs of providing the service back to the school. Examples would include parents who pay for additional services provided by the school, such as educational field trips. Such

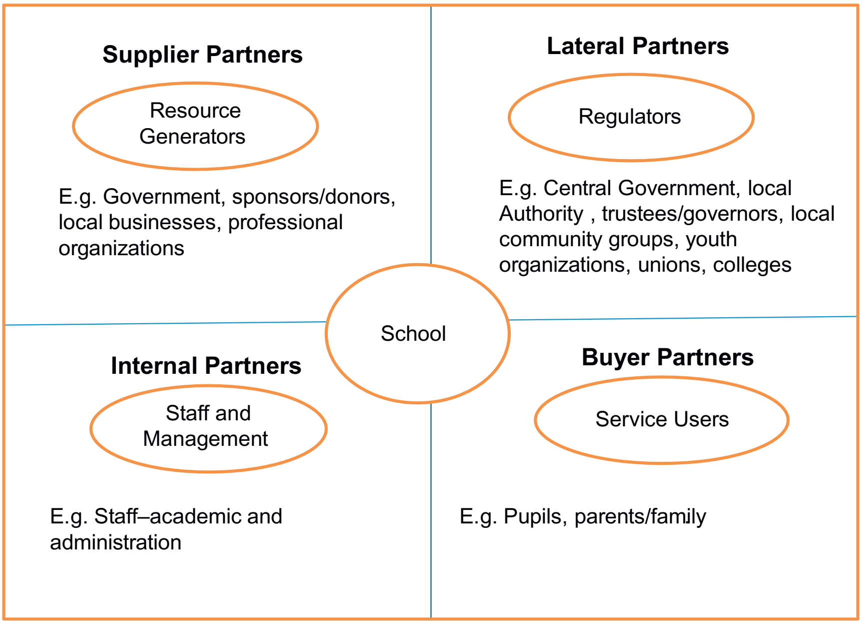

Fig. 2. A Relationship Marketing Approach in Schools.

additional services provide the schools with an opportunity to add value to the service they provide. Field trips, for example, can bring the curriculum to life, providing deeper subject learning and increasing the self-confidence of the student (HSE, 2011).

Internal partners are the staff (both teaching and administrative) as well as the manager(s) or principal. Trim (2003) identified this group as the "internal customer," and indeed development of this relationship would typically fall within the remits of internal marketing. There does, however, exist some debate as to whether management of internal partners, via internal marketing, is a marketing or human resource function, as internal marketing is typically described as a set of marketing activities, for example, internal communication as well as activities more often associated with the human resources function (e.g., employee training and employee empowerment) (Ahmed & Rafiq, 2000). Scant research has been conducted on internal marketing in an education context (Oplatka & Hemsley-Brown, 2004). One notable exception, albeit in the university context, is the work of Küster and Avilés-Valenzuela (2010) who suggest that knowledge of

RM and internal customers should be promoted within universities so that each level in the employee hierarchy sees the other levels as their own customers. In addition, their work suggested that value may be added in the relationship with employees by, for example, the delegation of decision making, that is, employee empowerment.

Supplier partners are the direct or indirect resource generators, providing funding or goods and services. In the context of UK schools, the government (either central or local authority) is the primary source of financial funding. For example, academies are funded directly from the central government and operate largely without receiving local authority support services (Mansall, 2011), whereas state-funded schools are funded by the local (government) authority.

Additional funding is also available via grants, from a variety of large and small organizations. Some of the main grant bodies schools may have relationships with are those providing lottery funding, European funding, single regeneration funding, trust funds, private company, and charity grants. Some grants will be provided "in kind" rather than financial funding, for example, in the form of land, buildings, or equipment. Other typically smaller, but no less important, contributions come from sponsors (e.g., local and national businesses) and other donors (e.g., student alumni). This quadrant therefore contains a wide range of entities, with potentially different needs and wants from the relationship. Schools need to break this group down further in order to fully understand, manage, and potentially add value to each relationship. For example, alumni donors have been found to be more likely to respond to a fund-raising campaign where contact is made through different channels including newsletters, sponsored alumni gatherings, and invitations to alumni to interact with current students (Tsao & Coll, 2005). All three channels provide an opportunity for schools to also build and add value to the relationships they have with alumni.

Lateral partners are regulators who can constrain or define what the school can do. The Government and their associated bodies are the main regulators. Examples of the associated bodies include the Office for Standards in Education (Ofsted), Children's Services and Skills, and the Office of Qualifications and Examinations Regulation (Ofqual). Schools also have trustees and governors. UK governing bodies are accountable for the use of public funds, the quality of education provided, and the wider contribution to the community (Directgov, 2011)

As identified earlier, unlike many other not-for-profit organizations, school employees can be union members. In England and Wales, the largest teachers union is the National Union of Teachers (NUT), who act as a regulator in terms of their campaign to, for example, implement a standard performance management model for all teachers (NUT, 2011).

Although the relationships falling within this sector are all considered lateral, there are clearly differences in the nature of the relationships. For example, some of the entities can exert direct control, while others are indirect. Constraints imposed by the government are direct relative to those, for example, from local community groups and youth organizations who can put pressure on the school to act or behave in a certain way but have little direct control. This does not necessarily mean that these relationships are any the less important, but they need to be recognized as different.

DISCUSSION

The conceptual framework presented in Fig. 2 provides a classification of the complex array of different relationships schools have. By placing the relationships into one of four quadrants, this enables schools to better understand the different relationships they have with buyers, suppliers, internal and lateral partners. It also allows schools to manage their relationships more effectively at both a strategic and tactical level, as the groupings that are most relevant to their current and future plans can be quickly identified depending on where the priority lies. For example, if additional funding is required, then the school needs to focus on the supplier partners quadrant and identify those entities that can provide additional support to the school. Schools have a limited amount of resources to develop and manage their relationships and therefore need to prioritize the relationships they have.

In order to add value to the relationship, schools need to understand the nature of the different relationships. Gwin (1990) suggested that there will be general agreement across all four quadrants about the global interests of the organization, but that each group has its own specific needs and goals. Gwin goes on to suggest that organizations should undertake research to understand the needs of each quadrant and to compare this with their "common wisdom" to see if they have a true and accurate picture of the needs of their partners. Schools will have a good understanding of those entities with whom they are in regular contact; however, for others the picture may not be so clear or accurate.

While each quadrant has its own specific needs, the needs of the individual entities making up that quadrant are likely to differ. For example, all those within the lateral partners quadrant are concerned with regulation; however, their objectives or reasons for being concerned with regulation will differ, not least of all as some of the relationships are essentially mandatory (e.g., local government) and for others engagement could be optional (e.g., community groups). Where needs differ, the expectations and perceptions of what is received and what is given, i.e., the mutual exchange, will also differ. It is important for schools to understand what each partner wants from the relationship now and in the future, and this can be achieved through ongoing dialogue.

The partners also differ in the type of relationship they have with the school; some have a B2B relationship and others a B2C relationship. Although the internal partners and buyer partners are all B2C and the lateral partners are all B2B, relationships between the supplier partners are mainly B2B with some B2C. Where the type of relationship differs from B2B and B2C, a different marketing approach is likely to be required for consumers compared to businesses. This difference raises the question of whether management of the different relationships that schools have should be based on the quadrants, the type of relationship, or a mix.

Finally, a relationship with any one entity does not always neatly fit within one of the quadrants and may fall into one or more quadrants. For example, local government falls into the supplier and lateral partner categories. Relationships falling within several quadrants are potentially a priority relationship and require careful management, although importance will vary by context and over time. These issues have implications for how schools manage their relationships and how value can be created and added.

CONCLUSION

This chapter responded to the call from Oplatka and Hemsley-Brown (2004) to provide a classification of the marketing relationships schools have. It has utilized a conceptual framework developed from the RM literature and applied it theoretically to the school context. Application of the framework has provided useful insights and aided our understanding of the nature and type of relationships schools have with individuals, organizations, and other entities. It has, however, also highlighted the complex nature of the relationships schools have and the challenges schools face in managing and developing those relationships. Added to this complexity is the changing nature of the relationships themselves which will vary by school, context, and over time. As this chapter is conceptual, empirical research is thus needed to assess the validity of the framework in a practical context.

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FORMS OF MARKET ORIENTATION AMONG PRIMARY AND SECONDARY SCHOOL TEACHERS IN ISRAEL

Izhar Oplatka and Jane Hemsley-Brown

ABSTRACT

This chapter presents an analysis of data gathered from Israeli primary and secondary schoolteachers that tested the degree of market orientation in the Israeli State Education System, the largest system in Israel that is based on grade configuration of primary education (1–6) and secondary education (7–12). It was found that the Israeli teachers are more positive about student orientation (SO) than about competitor orientation and interfunctional coordination, i.e., they are more likely to be positive toward the elements of SO that are emotion embedded and represent teachers' concern toward and relations with their students. They can identify with elements of SO that represent teachers' strong emotional commitment toward students, which in turn leads them to change their teaching methods, be attentive and responsive to parents' interest in the learning of the child, and improve their own teaching. In doing so, the teachers are engaged unconsciously with relationship marketing that might promote their school's market share and image.

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INTRODUCTION

A common finding across many studies worldwide points to the significant role of a relationship marketing (RM) approach that puts emphasis on nurturing relationships, especially with existing customers, and the development of supportive market networks (Brown, Fisk, & Bitner, 1994) for educational institutions. An underlying assumption is that attracting, maintaining, and enhancing customer relationships is an important determinant of the customer's overall satisfaction with a service. Forms of RM have been observed in schools worldwide (e.g., Bell, 1999; Oplatka & Hemsley-Brown, 2004).

The RM approach commences with a commitment to marketing orientation (MO) and to developing an organizational culture that is customer driven, and focuses on the quality of the service (Narver & Slater, 1990). MO frequently underpins the development and implementation of successful RM strategies in any organization (Helfert, Ritter, & Walter, 2002). If a school can develop or improve its degree of MO, then it should also be able to achieve improved levels of RM. To the best of our knowledge, the literature on educational marketing has not paid sufficient attention to MO and explored its implications for schools.

This chapter presents an analysis of data gathered from Israeli primary and secondary schoolteachers that tested the degree of MO in the Israeli State Education System, the largest system in Israel that is based on grade configuration of primary education (1–6) and secondary education (7–12). This system is divided into the Jewish State education system and the Arab State education system that serves Jewish and Arab students, respectively, and has faced a higher level of accountability, competition, and marketization in recent years.

As there is already some empirical evidence for the positive impact of MO on industrial and service organizations (e.g., Cervera, Molla, & Sanchez, 2001; Gu, 2002), it seems of high value to examine the degree of MO in educational systems because this kind of examination could provide some clues about the relationship between market-oriented education policies and the incorporation of MO in educational settings. Besides, whereas past research on MO found that it is positively correlated with innovation, excellence, employees' high levels of satisfaction and commitment, customers' satisfaction, and brand loyalty (Pulendran, Speed, & Widing, 2003), educational systems have long been accused of neglecting these important issues. Understanding the context of MO within educational institutions is, therefore, the first stage in attempting to increase this orientation in educational systems.

Based on an instrument developed by the authors to measure perceptions of MO in education (Oplatka & Hemsley-Brown, 2007), validated in a comparative study of MO in HE settings (Hemsley-Brown & Oplatka, 2010), the reported study examined perceptions of the general degree of MO among schoolteachers working in an era of marketization and tested whether there are significant differences among the teachers, in terms of perceptions of MO in relation to personal, structural, and organizational variables.

MARKET ORIENTATION: A KEY ELEMENT IN MARKETING THE SCHOOL

Many managers today recognize that the ability to succeed in the marketplace requires more than just sales techniques – customers rarely respond to sales pitch, but rather they want their circumstances to be acknowledged and their needs to be satisfied. Successful marketing is now much more targeted, and the meeting of customers' needs is of high value. Hence, business and service organizations seek to achieve a competitive advantage in their dynamic environments, at least in part, by being market driven, that is, by anticipating, understanding, and responding to the preferences and behaviors of customers (Jaworski, Kohli, & Sahay, 2000).

The marketing literature is replete with definitions and perspectives of MO, yet there is much agreement about the key concepts (Harris, 2002; Helfert et al., 2002; Kohli, Jaworski, & Kumar, 1993; Narver & Slater, 1990). At the core of this concept is the significance of customer orientation. Accordingly, customers' needs, desires, and particular circumstances, for example, lifestyles, ought to be the main focus of the market-oriented organization. In this sense, MO is the degree to which an organization generates and uses intelligence about the current and future needs of customers, develops a strategy to satisfy these needs, and implements that strategy to meet those needs and wants.

MO takes into account the influence of competitors and incorporates interfunctional coordination. It encourages the generation of intelligence – or the use of data about competitors – and integrated cross-functional processes, in addition to the execution of a strategic organizational response to market opportunities. All these activities are directed toward creating and satisfying customers through continuous needs-assessment.

In the school context, we believe that a focus on current and prospective customers (parents, students) should take precedence over the two other functions of MO. In our view, MO is a set of beliefs that puts customers' interests first, but at the same time raises the school's awareness of the need to obtain information about competitors and establish cross-departmental activities to satisfy customers' needs, in order to gain a competitive edge in the turbulent, competitive environment.

MO appears also to be an aspect of organizational culture, where attention is focused on the values, attitudes, and beliefs collectively held by an organization's members. For Narver and Slater (1990), two of the leading researchers of MO, this orientation is the part of the organizational culture that gives priority to profits and to providing good value to customers, while at the same time supporting the interests and further development of the organization.

However, MO as an element of the school culture extends beyond customer orientation. Based on the works of Narver and Slater, we suggest the following three related components of MO that are underpinned by shared values and beliefs, and that may help school administrators, managers, and teachers to understand the school and its environment, and may also provide them with norms for behavior.

(a) *Customer (student) orientation*: School members are assumed to understand the school's target market thoroughly, and be capable of creating and providing superior value, over time. A teacher who subscribes to this approach in practice would collect information about how the environment in which his/her students lived (e.g., lifestyle factors) changes teaching methods to accommodate students' particular needs, and would be attentive and responsive to parents' interests and points of view. Through this approach, it would then be possible to be more innovative and implement improvements for future students based on their anticipated needs.
(b) *Competitor orientation*: School principals and teachers who aim to fully understand the strengths and weaknesses, as well as the capabilities and potential, of competing schools, seem to internalize this element of MO. Awareness of the importance of competitor activity and the monitoring of developments in competing schools can have a positive impact on decision making, particularly through the development of new initiatives: additional services for parents and students.
(c) *Interfunctional coordination*: The core belief which needs to be shared by all members of the school is that creating superior value for target

customers is very significant for the success of a school in a competitive marketplace. This can only be achieved, however, through the integration and coordination of the school's resources. Attracting and sustaining student-customers should not be solely the responsibility of school management, but should be the responsibility of everyone in the school community. School staff should have full access to information about the competition: the market environment, the community, and so forth, in order to achieve this.

The first two elements of the MO indicate a relative emphasis on collecting and processing information pertaining to customer preferences and competitor capabilities, respectively. The third element encompasses the coordinated and integrated application of organizational resources to synthesize and disseminate market intelligence, in order to put processes in place to build and maintain strong relationships with customers.

METHODOLOGY

Before presenting our findings, some words about the research design and sample are warranted.

Sample and Sampling

The researchers contacted a random sample of teachers from a pool of students studying in one Israeli university (in the School of Education) and one teacher education college, asking them to complete a questionnaire. Following analysis of the pilot study data (Hemsley-Brown & Oplatka, 2010), sample size calculations indicated that the minimum sample size for the study should be 50 participants; the final sample for this study was 69. The researchers sought to collect more than 50 completed questionnaires, and then cleaned the data by excluding questionnaires with incomplete responses. All schools and individuals remain anonymous as required, and the ethical protocol dictates that subsequent publications would not give names of institutions or individuals involved. Participation by individual respondents was voluntary.

The sample included 11 males (15.9 percent) and 56 females (81.2 percent), a ratio that represents, by and large, the gender composition of the teaching workforce in the Israeli State Education System (two respondents did not indicate their sex). The age of the respondents varied from under 30 to over 52, as presented in Table 1.

Twenty-nine respondents teach in primary schools (42 percent) and 39 in secondary schools, either a junior high or high school (56.5 percent). One respondent did not indicate the type of school where s/he teaches. Additionally, 55 respondents work in mainstream schools (79.7 percent) while 13 work in schools for special educational needs pupils (18.8 percent). One respondent did not provide a response to this question.

Research Design and Methods

The MO questionnaire comprises 32 factor items rated on a six-point scale, categorized using three headings: (1) market (student–customer) orientation; (2) competitor orientation; and (3) interfunctional coordination. Tests to measure the reliability of these three constructs and the whole questionnaire were conducted in a study we carried out several years ago about MO in higher education (Hemsley-Brown & Oplatka, 2010). This study provides evidence that the constructs are reliable, with Cronbach's scores above .8:

- total market orientation (32 items), .92;
- customer orientation (18 items), .832;
- competition orientation (6 items) .842; and
- intrafunctional orientation (8 items), .816.

Summative scores and mean scores were calculated for each respondent for each component and are used for hypothesis testing.

The researchers avoided using the word "marketing" in the questionnaire itself because it has other connotations and associations for the respondents. The word "marketing" is often assumed by those who do not study

Table 1. The Age Composition of the Respondents.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No response	2	2.9	2.9	2.9
	20–30	10	14.5	14.5	17.4
	31–40	40	58.0	58.0	75.4
	41–50	15	21.7	21.7	97.1
	51 +	2	2.9	2.9	100.0
	Total	69	100.0	100.0	

marketing to mean "selling" and "advertising," and could mislead the respondents. The questionnaire, therefore, uses the phrases "market orientation inventory" and focuses on "student orientation (SO)" rather than "market orientation." The items are drawn from factors identified in the literature on theories of market orientation.

Analysis of Data

Tests were carried out to determine whether there were significant differences between the perceptions of MO by teachers in mainstream schools and teachers in special needs schools. The results were not significant and therefore the sample can be treated as a single sample in this respect.

The following research hypotheses were formulated:

H1. There is a difference between the mean scores schoolteachers award for the three components of MO (showing teachers are more positive about one/two components of MO than other components).

H2. Teachers from a primary school and teachers from a secondary school show differences in perceptions of the market orientation of their schools.

FINDINGS

The findings section begins with a presentation of the mean scores of items that make up each dimension of market orientation: SO, competitor orientation, and interfunctional coordination. From Table 2, it is clear that items representing "SO" that are emotion embedded (e.g., attentiveness to students' concern, understanding the students' needs, caring for students) gain the highest mean scores. One sample *t*-test conducted to compare mean scores for each item with the midpoint (3.5) indicates that for SO the top ranked 14 item scores are significantly above the midpoint. In contrast, items referring to parents' views and their influence upon the school gain the lowest scores ($M \geq 4$) (the lowest six items are not significantly above or below the midpoint). The Israeli teachers, then, are unlikely to perceive teachers' and principals' decisions as resulting from parents' educational views and needs.

Table 2. Mean Scores for Student Orientation.

Items for Student Orientation	Mean
Teachers are attentive to students' concerns	4.78
I feel committed to the school community	4.75
My school understands the needs of children	4.71
My school cares about children's well-being	4.67
Complaints by parents and students are dealt with quickly	4.49
My school understands what kind of schooling parents value most	4.42
My school meets, or goes beyond, the promises it makes to parents	4.39
The complaints procedure is easy for parents and students to understand	4.32
Parents are given information that helps them in understanding the kind of schooling we have here	4.30
A good teacher is the one whose students are happy and satisfied	4.30
My school responds to parents' requests effectively	4.28
Teachers in this school are eager to help children – and go beyond their role definition	4.26
Responding to parents' and children's needs is my major task	4.22
Our principal promotes the spirit of customer orientation and focus	4.17
Teachers are regularly provided with information about parents' desires and views of schooling	3.80
We encourage parents to offer constructive positive comments	3.64
My school measures children's satisfaction every school year	3.57
In my school parents' views of education influence the schooling process	3.57
We encourage parents to offer constructive negative feedback	3.14
My school measures parents' satisfaction every school year	2.67

Israeli teachers believe that their schools compare favorably with other schools (4.06) and in terms of understanding students' needs (3.94). However, they were modest about this and give lower scores to the statements that "teachers always look at what is going on in other schools in the area" (3.90) and that their schools "understand the needs of parents and students better than other schools" (3.81). Put differently, teachers believe their own school compares favorably, but they do not claim they are better than competitor schools. A full list of the mean scores for each item in the competition orientation construct is provided in Table 3. Only the top three ranked items are significantly positive (above the mean) according to the test results.

The last construct – interfunctional coordination – attempts to measure teachers' perceptions of their internal mechanisms and whether they focus on student-customers, particularly staff involvement in marketing. As seen in Table 4, the highest mean score is for not perceiving marketing as the sole

Table 3. Mean Scores for Competitor Orientation.

Items for Competitor Orientation	Mean
My school compares favorably with other schools in the area	4.06
My school understands the needs of students better than other local schools	3.94
Teachers always look at what is going on in the other schools in the area	3.90
Our schools understand the needs of parents and students better than other schools in the area	3.81
Information about what my colleagues in other schools are doing does help me improve my teaching	3.51
The principal often discusses the actions of other schools in our area	3.43
My school usually responds to other schools' new initiatives/developments	3.20

Table 4. Mean Scores for Interfunctional Coordination.

Items for Interfunctional Coordination	Mean
Marketing should not be the sole responsibility of school management	5.32
Teachers cooperate to promote the school image	3.81
All departments contribute to school marketing	3.55
In department meetings we discuss information about parents' demands and concerns in order to make improvements	3.30
Marketing information is discussed and shared with teachers	3.30
The guiding light in curriculum development or new initiatives is the demands of the parents and students	2.91
Teachers are not just paid to teach; they need to also help to attract prospective students	2.78

responsibility of school management (5.32 with a significance of .001), followed by modest scores for active involvement of teachers in school image-building, promotional activities, and marketing research in schools (which are not significantly above the mean of 3.5). Interestingly, there is a conflict between the teachers' view of marketing as a function that should not be managed and operated by the principal and middle managers in school, and their disagreement with the item ''teachers are not just paid to teach, they need to also help to attract prospective students'' (2.78, i.e., below the midpoint of 3.5 with a significance of .001). This contradiction may highlight teachers' strong professional ethics in terms of strong commitment to teaching and learning, as well as teachers' resistance to extending their role definition to include tasks and activities out-of-class, and particularly those related to promotion and marketing. There is also a significant score for the item "The guiding light in curriculum development or new initiatives is the demands of the parents and students" (2.91), indicating that teachers are significantly more negative about this item. Perhaps this is not surprising since much of curriculum and new initiatives are led by governments rather than by teachers.

Prior to testing the differences among the constructs of MO indicated above, a test to establish normality of data was conducted. The Kolmogorov–Smirnov statistic shows a significance level of .200, indicating that data are normally distributed and therefore parametric testing is used.

Congruent with H1, average scores for each construct show differences between the mean scores schoolteachers award for the three components of MO based on the results of the Friedman test; therefore, the null hypothesis is rejected. Clearly, teachers are more positive about SO (mean = 4.12; mean rank 2.52) than about competitor orientation (mean = 3.69; mean rank 1.77) and interfunctional coordination (mean = 3.56; mean rank 1.71). Furthermore, as Table 5 shows, there is much more agreement among the sampled teachers with regard to the items for SO (SD = .72378) than with regard to the items for the other constructs of MO – competitor orientation and interfunctional coordination (.95871 and 1.01681, respectively). This means that Israeli teachers share similar views toward their relationships with students and parents as toward their school's relations with other schools in its area and toward their own role in the marketing and promotion of their school in the era of accountability and marketization.

The Friedman test shows that the mean scores for SO (mean rank 2.52) are significantly higher than scores for either CO (mean rank 1.77) or IF (mean rank 1.71). Teachers are more positive about aspects of SO than the other variables. This is manifested in Tables 6 and 7.

Table 5. Descriptive Statistics.

Constructs	*N*	Minimum	Maximum	Mean	Std. Dev.
Average SO	69	2.25	5.65	4.1225	.72378
Average CO	69	1.14	7.86	3.6936	.95871
Average IF	69	1.29	7.29	3.5694	1.01681
Overall MO	69	2.26	5.15	3.9203	.64651

Table 6. Ranks.

	Mean Rank
Average SO	2.52
Average CO	1.77
Average IF	1.71

Table 7. Friedman Test.

N	69
Chi-square	28.706
Df	2
Asymp. Sig.	.000

Differences between Groups

The *t*-test analysis demonstrated that there is no difference between males and females for overall MO, SO, CO, or IF, no difference between SE and non-SE for overall MO, SO, CO, or IF, and no difference between age groups for overall MO, SO, CO, or IF. In contrast, there is a significant difference between primary and secondary schoolteachers in terms of overall MO. Primary schoolteachers are more positive overall (mean score 4.12) compared with secondary schoolteachers (mean score 3.78). Primary schoolteachers are more positive about all aspects of MO. The level of significance is .32. This is manifested in Tables 8 and 9. H2, then, is confirmed partially.

More specifically, as far as SO is concerned, primary teachers awarded high scores to items indicating the close relationships between teachers and students and teachers and parents (e.g., "teachers are attentive to students' concerns" (5.14), "complaints by parents and students are dealt with quickly" (4.86), "the complaints procedure is easy for parents and students to understand" (4.79)). Their counterparts from secondary education awarded low scores to the school–parents relations (e.g., "complaints by parents and students are dealt with quickly" (4.21) and "the complaints procedure is easy for parents and students to understand" (3.97)). Secondary schoolteachers ranked high scores to items such as "I feel committed to the school community" (4.92) and "my school understands the needs of children" (4.74).

Table 8. Descriptive Statistics Primary School.

	N	Minimum	Maximum	Mean	Std. Dev.
Average SO	29	3.15	5.65	4.2914	.70497
Average CO	29	2.00	7.86	3.9310	1.10632
Average IF	29	1.29	7.29	3.7980	1.07755
Overall MO	29	3.03	5.15	4.1156	.62292
Valid *N* (listwise)	29				

Table 9. Descriptive Statistics Secondary School.

	N	Minimum	Maximum	Mean	Std. Dev.
Average SO	39	2.25	5.50	3.9910	.72827
Overall MO	39	2.26	5.15	3.7760	.64150
Average CO	39	1.14	5.29	3.5128	.81587
Average IF	39	1.43	5.14	3.4249	.95241
Valid *N* (listwise)	39				

Table 10. Descriptive Statistics of Primary School CO.

Descriptive Statistics Primary School CO	Mean
The principal often discusses the actions of other schools in our area	4.21
My school compares favorably with other schools in the area	4.21
Teachers always look at what is going on in the other schools in the area	4.14
My school understands the needs of students better than other local schools	4.10
Our schools understand the needs of parents and students better than other schools in the area	4.10
Information about what my colleagues in other schools are doing does help me improve my teaching	3.66
My school usually responds to other schools' new initiatives/developments	3.10
Valid *N* (listwise)	

Primary and secondary teachers differ significantly also in respect of competitor orientation, as is reflected in Tables 10 and 11. For example, while primary school principals are considered to often discuss the actions of other schools in their area (4.21), their counterparts from secondary education are significantly less likely to do so (2.82). Similarly, although more moderately, primary teachers tend to look at what is

Table 11. Descriptive Statistics of Secondary School CO.

Descriptive Statistics Secondary School CO	Mean
My school compares favorably with other schools in the area	4.00
My school understands the needs of students better than other local schools	3.85
Teachers always look at what is going on in the other schools in the area	3.69
Our schools understand the needs of parents and students better than other schools in the area	3.62
Information about what my colleagues in other schools are doing does help me improve my teaching	3.36
My school usually responds to other schools' new initiatives/developments	3.26
The principal often discusses the actions of other schools in our area	2.82
Valid *N* (listwise)	

Table 12. Descriptive Statistics Primary School IF.

Descriptive Statistics Primary School IF	Mean
Marketing should not be the sole responsibility of school management	5.93
Teachers cooperate to promote the school image	4.07
Marketing information is discussed and shared with teachers	3.72
All departments contribute to school marketing	3.66
In department meetings we discuss information about parents' demands and concerns in order to make improvements	3.52
Teachers are not just paid to teach; they need to also help to attract prospective students	2.59
Valid *N* (listwise)	

going on in the other schools in the area (4.14) more than secondary teachers (3.69).

Finally, primary and secondary teachers are in conflict, although in a subtle manner, in respect of the interfunctional orientation. Generally, primary teachers give higher ranks to most of the items in this construct (except the item ‘‘teachers are not just paid …’’).

This means that they claim that marketing should not be at the sole hands of principals, and that teachers should cooperate to promote the school image more than their counterparts in secondary education. Tables 12 and 13 demonstrate the distinctions between the primary and secondary teachers in our study.

Table 13. Descriptive Statistics of Secondary School IF.

Descriptive Statistics Secondary School IF	Mean
Marketing should not be the sole responsibility of school management	4.95
Teachers cooperate to promote the school image	3.67
All departments contribute to school marketing	3.51
In department meetings we discuss information about parents' demands and concerns in order to make improvements	3.15
Marketing information is discussed and shared with teachers	3.00
Teachers are not just paid to teach; they need to also help to attract prospective students	2.92
Valid *N* (listwise)	

DISCUSSION

Clearly, the Israeli teachers are more positive about SO than about competitor orientation and interfunctional coordination, a finding that corroborates academics' MO in England and Israel (Hemsley-Brown & Oplatka, 2010). More specifically, teachers are more likely to be positive toward the elements of SO that are emotion embedded and represent teachers' concern toward and relations with their students. They can identify with elements of SO that represent teachers' strong emotional commitment toward students, which in turn leads them to change their teaching methods, be attentive and responsive to parents' interest in the learning of the child, and improve their own teaching. In doing so, the teachers are engaged unconsciously with RM that might promote their school's market share and image.

Conversely, and in light of the ethic of the teacher as a professional (Socket, 1993), the teachers refrained from expressing positive attitudes toward elements of MO that emphasize interschool competition. It is likely that this kind of competition is perceived by teachers to be improper and unethical in the education arena which is, at least ideally, very value-based. Likewise, and congruent with English and Canadian teachers (Oplatka, 2006; Oplatka, Hemsley-Brown, & Foskett, 2002), the teachers tended to be less positive toward interfunctional coordination, and especially, toward any attempt to extend the teacher's role definition to include any proactive participation in the school's marketing activities.

Note, however, that innovation and curriculum development in education are constrained, by and large, by legislation and governmental centrality, leaving teachers usually uninvolved in change initiation (Nir, 2009). Much of the importance of MO in the commercial context is about responsiveness to customers that is more limited in terms of schools. Therefore, teachers were unlikely to agree that innovation and development in schools is driven by the needs of the customers. In some sense, even if they would like parents to have more influence, it is far beyond teachers' ability to achieve this.

Interestingly, but hardly surprising given our knowledge about the different work attitudes of primary and secondary schoolteachers, primary schoolteachers were more positive about all aspects of MO, and ranked high scores to items indicating the close relationships between teachers and students and teachers and parents. This corroborates the research on teacher emotions which has emphasized the central role of emotions in primary teaching (Nias, 1989) and in student achievement. Primary teachers feel committed to creating emotional bonds with their students in order to develop them more effectively and facilitate a positive climate in a school (O'Connor, 2008). This might account for, at least in part, the Israeli primary teachers' positive attitudes toward SO.

Primary and secondary teachers differ also in respect of competitor orientation and interfunctional coordination, perhaps due to the different organization size of their schools. Usually, primary schools are smaller than secondary schools in terms of the number of students, the size of the staff, and the physical setting. As small school size is positively related to social relations in school (Ready, Lee, & Welner, 2004), the primary teachers' relatively positive attitudes toward competitor orientation and interfunctional coordination might be explained, among other things, by their profound social cohesiveness and strong sense of organizational commitment. They will be more likely to be engaged in promotional activities and market intelligence than secondary teachers who usually work in loosely coupled organizational systems characterized by low interdepartmental communication and isolated work environments (Hoy & Miskel, 2008).

Under the constraints of a small sample size, the theoretical message of this study is twofold; first, MO is strongly related in educational systems to teacher emotion and the school climate that regulates "correct" forms of emotion management in the classroom. Second, and arising from the first point, is a possible compatibility between MO and the characteristics of primary education/teaching that allows primary teachers to identify with SO more profoundly than their counterparts in secondary education. It seems just "natural" for primary teachers to generate and use intelligence about the current and future needs of their students (who are "customers" in the neoliberal terminology), to develop a strategy (a new teaching method?) to satisfy these needs, and to establish cross-departmental activities to satisfy customers' needs. But their goal is not necessarily to gain a competitive edge in the school's environment or to raise their school image. The student's needs are not juxtaposed in their mind with competitive orientation or interfunctional coordination (i.e., marketing efforts), but their fulfillment is seen to be for its own sake.

Thus, as the RM approach commences with a commitment to MO (Narver & Slater, 1990), one could see this approach as deriving from the teacher's strong emotional commitment to his/her students rather than a means to attract intake or increase the school's image in its environment. In other words, if a school can develop or improve its degree of MO through increasing teachers' commitment to their students, then it should also be able to achieve improved levels of RM through the same professional code that underlies the teaching profession.

Further research on MO in schools ought to examine the frequency of this construct, including its three subconstructs, in a wide variety of countries and educational systems to allow deeper understanding of this construct in compulsory education. Furthermore, the impact of different variables and factors upon teachers' attitudes toward the different constructs of MO may illuminate additional aspects of this construct in schools.

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EDUCATIONAL MARKETING AND THE PACE OF INNOVATION

Miri Yemini

ABSTRACT

During the last two decades, education systems worldwide have been working under an increasing need to adapt to a rapidly changing postindustrial external environment with social, technological, economic, and political transformations. The unprecedented growth, complexity, and competitiveness of the global economy with its attendant socio-political and technological developments have been creating relentless and cumulative pressures on education systems to respond to the changing environment. Today, educational institutions from primary schools to universities are being forced to compete and excel in the international arena, and are thus expected to go far beyond simply providing pure knowledge and skills as before. Increasingly, more institutions in primary and secondary education are embracing innovative practices from the global business world and dedicating growing attention to strategic and marketing aspects of educational management.

The European Commission has defined innovation as the "building block of the future competitive workplace during the 21st century" and the strategy of educational institutions around the world is being affected to a large extent by this statement. This chapter focuses on the identification

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and definition of the future challenges in schools' governance, and presents a novel logical framework for the arena of educational marketing. Special attention is given to innovation as a key driver for further development of educational institutions and its possible impact on marketing efforts in educational institutions. These aspects, previously overlooked by research literature, are discussed in the present chapter, adding a new dimension to the understanding of strategic facets in the educational marketing arena.

INTRODUCTION

Innovation is becoming increasingly important for the development of the 21st century knowledge society (Ylinenpaa, 2009). It contributes to economic growth as well as to social and individual prosperity, and is considered to be an essential factor for a more competitive and dynamic environment. Education has for a long time been centered in fostering creative and innovative skills, while innovative management of educational institutions is also starting to gain an increasing volume of academic and business publications (Caniels & van den Bosch, 2011). This chapter focuses on the identification and definition of the future challenges in schools' governance, and presents a novel logical framework for the arena of educational marketing. It will start with a detailed description of the innovative trends in the key aspects of the education system, and continue with a discussion of the multifaceted effects of those trends on educational marketing. Finally, practical implications for educators and schools' administration will be presented and detailed.

In recent years, innovation has proved to be a key enabler of progress and competitiveness, especially in times when the world is recovering from the aftershocks of a global recession. Today, with the worldwide focus on stabilizing the global economy and jumpstarting growth, a strong emphasis on directed pro-innovation policies can be a rainbow of hope for nations worldwide (Insead, 2009). Innovations are to an increasing extent seen as the result of an interactive process of knowledge generation, diffusion, and application, with education as a key aspect in this equation. Innovation usually refers to processes undertaken by individuals or organizations, where the process by itself might be characterized as innovative (e.g., organizational learning or managing) or the result of the process can be identified as innovative.

Organizational innovation refers to organizations that strive to break through, change the status quo, and develop characteristics in terms of products, processes, or services so that organizational performance can be enhanced. Innovation is one of reforms; it is a new concept applied to the promotion of products, processes, or service effects. Thus, innovation is involved in rugged environment changes, but not all changes will use new concepts or have the effect of significant improvement. Innovation is not only the key to survival for enterprise organizations in a rugged environment but also the critical point for school organizations to enhance educational quality and satisfy social needs. In many cases, schools' innovative management originates from external environmental challenges, changes, and pressures, as well as responsibility and performance requirements (De Pree, 2002). Although the school is different from the general business organization, in the face of a pluralistic society, under the expectations of all sectors of society, communities, and parents, schools really need to seek innovation and breakthrough when faced with an external environment which is constantly changing and the diversities of their contexts keep increasing (Zhao & de Pablos, 2009).

In the era of the knowledge economy, in order to improve the competitiveness of the school and achieve dominance, the key is to pursue innovation. School innovative management includes technological innovation: the work model of teaching and assessment, the change of resources operation, etc.; product innovation: the production of students' work, classroom, and teaching aids, teachers' works, etc.; service innovation: administrative services, community services, parent services, etc.; process innovation: the changes of teaching affairs, student affairs, general affairs, counseling, personnel, accounting business process, meeting flow, etc.; innovation activities: breakthroughs in school opening ceremonies, graduation ceremonies, celebrations, games, sports shows, open days, parents days, demonstration lectures, outdoor teaching activities, urban and rural exchange activities, etc.; and characteristics innovation: the development of school characteristics, building unique school culture, etc. (Zhao & de Pablos, 2009). Education systems around the world are rapidly adopting innovation agenda in their theory and practice, although the definition and scoping of this phenomenon is not clear. Discussion on innovation can include novel developments that change the way we do things, for example, the revolution in internet accessibility that affects teaching and learning, or it can also be attributed to innovative management procedures implemented by school heads, for example, collaborative team work with teachers and pupils in schools' governance. Innovation can also be related to regulation and policy, as decentralization and commoditization of education systems, or to the manner of inspection for schools' achievements, for example, through international exams such as PISA, TIMMS, and PEARLS. For the sake of the current discussion, innovation will be referred to in two different contexts. First, major innovations in education systems will be mapped and then innovative marketing implications for schools will be suggested.

Major Innovations in Education Systems

The second decade of 21st century has revealed a new set of challenges and aims in educational systems locally and globally. In the next section, the main challenges will be presented within the scope of national systems, and later measures and procedures will be suggested and detailed in the context of educational marketing. It is suggested to examine the challenges detailed below at primary and secondary levels. Since the academic and public discussion on innovation is extremely broad, to narrow the scope of the chapter here to the education system, we will first map major changes (innovative processes or innovations) in the education system and then discuss the possible impact of those changes on educational marketing. In order to better our understanding of these tremendous changes, we can classify them as primary and secondary innovations. While primary innovations usually originate from outside of the educational system and are usually part of global political, economic, and technological progress, secondary challenges are, generally speaking, formed inside the system, usually chaperoned or caused by primary challenges (innovations). The primary challenges include globalization and the ICT revolution, and are translated in the education system into (1) *internationalization* and (2) *technology use in education*. Major secondary changes include (1) *school – enterprise cooperation*, (2) *accessibility*, (3) *quality assurance*, and (4) *lifelong learning*. The justification for this classification is twofold. First, while secondary challenges occur inside the education system, primary challenges are not limited to education, but rather to society in general. Second, broadly speaking, education systems around the world are pushed toward primary challenges whether their effect on education outcomes is clear or not, while school heads and regulatory authorities can and need to decide when and to what extent the implementation of the secondary challenges is required.

Technology Use in Education

The 21st century is characterized by unprecedented progress in communication technologies, including fast and mobile internet access available for most of the population in developed countries, together with tremendous transformation in the habits and behaviors of young people around the world. Extensive use of technology, the internet, social networks, and availability of knowledge has completely changed the way we live and become an integral part of our teaching and learning reality (Larson & Murray, 2008). Education systems are compelled to change and evolve in accordance with the pace of these advancements. Indeed, e-learning has become an integral part of the classroom, with more and more lessons passed through individual computer-mediated learning procedures (Soffer, Nachmias, & Ram, 2010). Technology use in schools is becoming more and more abundant (Guri-Rosenblit, 2005), encouraged by the teachers together with requests from the students, and as we are looking toward the future, those trends will dominate the learning environment in the coming years, whether in terms of better accessibility to education for socially excluded populations, or by overcoming learning disabilities and bringing the future to the classroom in real time, real size, and scope (Larreamendy-Joerns & Leinhardt, 2006). The real advantage of ICT in education innovation is its inclusiveness, whether in terms of use of technology to reach new audiences, the amount of knowledge available for transfer and use, or in the possibilities to improve or even change the way that knowledge is transferred to the students. Technology use in education actually allows re-conceptualization of its role in teaching and learning and can drive the development of new pedagogies and curricula, and can eventually bring about new and meaningful learning experiences for students.

Internationalization of Education

To discuss international links, trends, and activities in education, this chapter will be following the lead of the American Council on Education in using the term "internationalization" to denote the incorporation of an international/intercultural dimension in teaching (Siaya & Hayward, 2003). This definition can be subsumed by the more comprehensive one proposed by Knight (2004): "Internationalization at the national, sector, and institutional levels is defined as the process of integrating an international, intercultural, or global dimension into the purpose, functions, or delivery of postsecondary education."

The importance of internationalizing the college and university environment is widely accepted (Kuwamura, 2009; Lawrence, 2004; Lopez, Lopez, Andrade, & Lopez, 2011; Murphy, 2007; Ninomiya, Knight, & Watanabe, 2009; Trilokekar, 2010). According to Green and Schoenberg (2006), "Internationalizing the curriculum is the most important strategy that institutions can use to ensure that all of their students acquire the knowledge, skills, and attitudes they will need as citizens and workers in a rapidly changing and globalized world.''

Institutions of higher education have tried to respond to this call, and it would probably be difficult to find a college or university today that is not making some effort to internationalize. The compelling pressures to internationalize, owing to the instantaneity in communication and rapid advances in transportation, which result in an increased need for intercultural and international understanding and knowledge, have become an urgent priority. International literacy has become critical to our cultural, technological, economic, and political health. As several scholars (Altbach & Knight, 2007; Dolby & Rahman, 2008; Uys & Middleton, 2011) maintain that internationalization has been mainstreamed, as an essential part of all reforms in colleges and universities, a question of the definition, existence, and roots of internationalization goes deeper and broader in the education system, meaning among other things internationalization in schools (mainly through secondary education) as they serve as a main influx for students into higher education and an entrance stage into the globalized workplace for those who do not continue their studies after high school.

The main parameters of internationalization in the higher education environment, such as student and staff mobility, do not seem applicable to the school environment. With the exception of international schools, serving mostly expatriates and diplomatic staff, mobility as a wide phenomenon does not exist in the school context. Schools are also more naturally indrawn and internally oriented toward the local community and environment than higher education institutions, due to tight local and governmental regulation and resource dependence on formal funding sources (Weenink, 2009). Tight regulation also inhibits local initiatives and entrepreneurial activities that otherwise could contribute to the international scope of the school atmosphere.

However, under the influence of neoliberal ideology and because of the recession of the early 1980s – the need to cut back spending – deregulation policies were introduced that favored more autonomy for schools. The thinking was that consumers of education should be free to choose between competing schools, and deregulation was regarded as the best way to achieve this. Ever since, schools have had more opportunities to establish their own policies, especially on administrative, financial, promotional, and staff matters. Moreover, increasing effects of globalization and demanding efforts of universities and colleges to internationalize in every sphere of life suggest that internationalization cannot suddenly occur in tertiary education without direct continuation from the bottom levels in high school and even before that.

More specifically, it is suggested that internationalization trickles to schools from two opposite directions. First, higher education institutions compete globally and look for students with wide global knowledge, thus forcing the schools to prepare internationalized graduates, meaning internationalized pupils. Second, the technological and dynamic environment of the 21st century results in children living and studying in a global environment using novel tools, devices, and skills, forcing schools to adapt to new ways of teaching and learning, and among other things to internationalize (Fig. 1).

Moreover, school leaders are forced to interact with various external stakeholders to gain additional resources and support. These stakeholders (parents, business sector representatives) might possess a higher degree of "international literacy," thus creating pressure of internationalization on the school. These forces comply with general isomorphism theory (DiMaggio & Powell, 1983), pushing the school to internationalize together with already internationalized higher education system.

It is proposed here, then, that internationalization in schools (and elsewhere) may be viewed as occurring on a continuum. At one end, internationalization is limited and essentially symbolic. For example, it may be reflected, in this case, by a relative handful of pupils participating occasionally in international programs such as Juvenile Achievement. At the other end of the continuum, the process of internationalization is conceptualized as a synergistic, transformative process, involving the curriculum and teachers' education programs, that influences the role and activities of all stakeholders including teachers, school heads, pupils, parents, administrators, and the community at large. Teachers are concerned with the future capabilities and knowledge that will be required in the future from their graduates. With education becoming more commercialized and commoditized, cultural and social aspects such as the transformation of English to a *lingua franca* of education and research on one hand, and increased interest in Chinese as a second language on the other, have become a burdened debate in education systems in most parts of the world.

Internationalization together with the revolution of ICT systems and a dramatic increase in technology uses in education are two major innovative challenges in the future of education. Although these separate, and sometimes opposite, phenomena created a move of major innovations in education systems, another set of secondary challenges that were influenced by the primary challenges can be traced. The next section will refer to those secondary innovations.

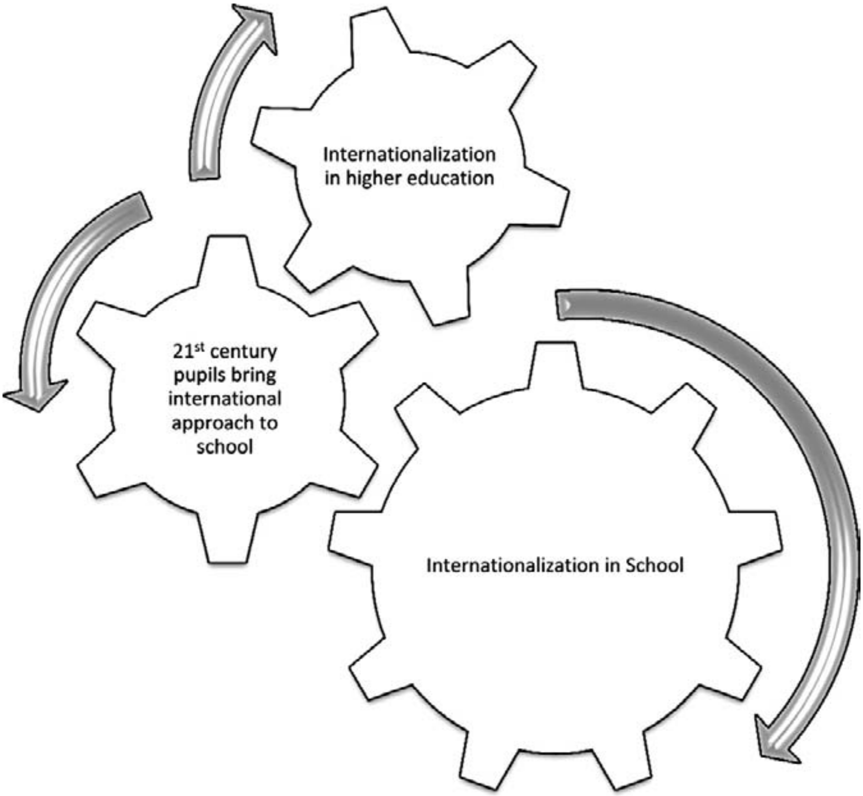

Fig. 1. Scheme of Internationalization Process in School.

School–Enterprise Cooperation

In times of decentralization, privatization, and scarcity of resources in the public sector, school leaders have opportunities to influence policy, resource allocation, and mobilization (McLaughlin & Brown, 2000; Whitaker, 2003), to address community-wide problems that are central to schools (Goldring & Schuermann, 2009), and to navigate between different powerful external and resourceful agencies trying to gain influence in the education system. Furthermore, school principals have opportunities to respond to calls for innovation, critical thinking, adaptability, and creativity (21st century skills) along with meeting the central government regulations through accountability demands and standardization of outcomes (e.g., Inbar, 2009; Schoen & Fusarelli, 2008).

School principals, therefore, must take risks inside and outside of the school organization (Crow, Hausman, & Scribner, 2002; Foskett, 2003). They have to act as ''resources investigators'' whose activities consider new initiatives and find new support for the work and funding required for school development and improvement (Earley & Weindling, 2004; Ogawa, Crowson, & Goldring, 1999) while establishing commercial and entrepreneurial connections with diverse external agencies (Harold, 1997). Although cooperation is highly valuable for both sides, special attention by school principals and policymakers should be given to possible side effects of this phenomenon, including proper regulation procedures and care for the educational needs of the students. In fact, due to better accessibility (caused by the use of technology) and more possibilities (caused by the opening of national boundaries), schools can create more links and relations with the business sector to promote schools' interests. This secondary innovative process is facilitated by primary innovative challenges, and creates a new and more complicated environment for school principals, since commercial interests might interfere with those of schools.

Accessibility

It is widely accepted that education promotes social mobility, and wider accessibility to education is one of the main sources of prosperity and social stability in the national and international arena. Accessibility is partly caused by better access facilitated by technological solutions, but also by an increasing demand for education from parents and pupils being influenced by global and international trends. Policymakers and international organizations such as the OECD and the World Bank cherish statistics on accessibility rates, especially among marginalized populations and immigrants all over the education system. Increasing access to education will remain a strong parameter on the future map of global and national goals, and challenges of accessibility will remain a concern of school heads, including financial, social, and cultural concerns.

Quality Assurance

Quality assurance, directly affected by accessibility and internationalization, forces the national regulators to face market forces and existing (usually out-of-date) government regulation schemes. During the last few decades, individual schools have gained freedom of choice on the local level, including decentralizing of the curriculum and funding (Whitaker, 2003). Parents were included in the school governance and children are viewed more and more as customers of the system, who choose a school according to its ranking performance, while the system itself is seen as a vehicle for regional and national competition (Oplatka & Hemsley-Brown, 2004). Major investments are being made by individual institutions in marketing and branding campaigns to achieve more recognition and increase enrolment, thus giving a new prominence to quality assurance and accreditation. Quality assurance is included here as a secondary innovation, since its importance is derived from the ability of customers (parents, school heads, governments, etc.) to compare schools' and countries' performance. The ability to compare is based on the availability of international examination systems as PISA, TIMMS, and others (internationalization) and the ease of comparison based on technological solutions (mentioned here as a primary innovation).

Lifelong Learning

Over the last few decades, trade, financial liberalization, deindustrialization, technological change, and the growth of the knowledge economy have altered the skills that workers need to maintain stable employment. Trade, capital market liberalization, and skills-based technological changes have reduced the number of jobs requiring low skills. The related process of deindustrialization has also made some types of skills obsolete because a number of industries have simply disappeared. In addition, the growth of the knowledge economy has increased the salience of cognitive skills, and technological innovations have shortened the "half-life" of skills, prompting the need to train more often (Nelson, 2010). The average student enters the education system between the age of 6–7, and most students finish their undergraduate studies before the age of 30. A contemporary trend in higher education is increased recognition for the concept of lifelong learning as a benefit, not only for individuals but also for the collective good of a country. A strong emphasis on learning motivates individuals toward continuous learning and helps to equip them with the skills and knowledge to be contributing citizens in the local, national, and international arenas (Gibb & Walker, 2011). Informal and continuous learning paths must be investigated in micro- and macroanalyses, and clear conclusions ready for policy implementation must be depicted.

To summarize, the first part of this chapter examined major primary and secondary innovations in the education context and defined their appearance and influence in education systems. Internationalization and the use of technology in education were identified as primary and global innovations that in turn formed and affected secondary innovations such as school–enterprise cooperation, accessibility, quality assurance, and lifelong learning.

All the innovations presented have changed the landscape of educational systems, the way teachers and students behave, and the way those organizations function. The next paragraphs will present the effect of those processes on marketing in educational systems.

EDUCATIONAL MARKETING IN A HIGH TECHNOLOGY ENVIRONMENT

In the previous section, different types of innovation in the educational system were presented, and now we will analyze those factors on the map of future education challenges and opportunities. The challenges are presented in Table 1, with emphasis on marketing in the educational system. This emphasis brought about new elements of uncertainty and complexity. The educational institution has to survive in a very complex, changing, and turbulent policy environment. The working environment of teachers and students is rapidly changing, while education itself is becoming more competitive and commoditized. School heads and educators must react to the changing map of education and deal in a proactive way with current and future challenges and threats. Six major trends in the future of education are presented in Table 1, together with possible marketing implications and suggestions.

(1) Technology utilization in education systems in developed countries is widespread and coherent at all levels, from kindergartens to universities. Not only are teachers ready to implement technology in teaching, but the students are living their lives in a high technology environment, thus inherently using technology in their learning. Today, due to technological advancement, education is much closer to the end customer; thus, technology can and should be used to individualize and customize the educational solution. Just as the industrial world had moved from mass production to customization and personalization of the proposed products and services, the educational world has the potential to bring a unique solution to each student in the best possible way. Hartley (2008) claimed that customization is actually the natural next step in the development of decentralization policies in education, where children are no longer referred to as a class or a cohort but as individuals. As education goes from standard and universal solutions toward quasi-market personalization and customization approaches, the marketing of education moves in the same direction, with an individualized and

Table 1. Major Future Trends in Education.

Challenges	Innovation	Marketing
Educational technology	• Solutions for disabled people • Teaching in distinct geographic areas • Teaching large audience • Student-centered teaching • Networks • Virtual classes	Customization and personalization of educational marketing
Internationalization	• Preparing students for global working environment • Using global resources for teaching • International students and staff • Intercultural education	Extension of academic horizon
Education–Industry cooperation	• Resource exchange • Extracurricular activities • New opportunities for collaboration with industrial and government sectors	More market-based standards; involvement of external stakeholders
Accessibility	• Cultural diversity • Economic prosperity	Transparent access to information; increased competition
Quality assurance	• Ability for fair comparison • Clear goals for improvement	New types of awards and qualifications
Lifelong learning	• New students • New teaching methods • New source for innovation	Greater demand for education

personal approach to marketing, usually based on performances in national examinations and league tables. Technological developments affect educational marketing in two ways: first, the abundance and high accessibility of the target population (parents and children) enables schools to personally approach and present their messages (e.g., by advertising and communicating through social networks such as Facebook, Twitter, and others). Customized education can be translated to customized marketing, and the use of technology for marketing education and customized educational solutions will give the institution an effective and usually inexpensive way to reach out to the most relevant audience with the most desirable tools. Second, advancement in the use and performance of educational technologies such as distant learning, e-learning, computer-based learning reveals novel added value for schools, which can in turn be exploited for marketing purposes.

(2) Internationalization poses a significant challenge for the future of education, comprising one of the major forces impacting and shaping the future of educational institutions on national, regional, and global levels. The opening of the gates of many educational institutions to international students, staff, resources, and cultures allows educators to pursue new tools and capabilities in teaching and delivering knowledge to students and other stakeholders. The use of global resources, from free content over the internet from the best schools to the exchange of students, staff, and other resources, gives internationalized institutions real added value which can also be translated into marketing channels. Internationalization in education has several influences on marketing strategy and implementation. First, the competition in the educational arena becomes fiercer; thus, school principals must invest more resources in marketing as a remedy for increased pressures from competitors. Second, internationalization promotes the diffusion of innovation between different and remote institutions by increased transparency of knowledge flow among regions and countries. The knowledge transparency also assists parents and pupils to compare between the available educational solutions as well as to participate by themselves as customers in the active reshaping of the available solutions. Internationalization also opens up a new niche in schools' differentiation, international education. Weenink (2009) proposed an analysis of internationalization trends in public secondary education in the Netherlands, with an emphasis on marketing the school by its value provided by the international sector within the school.

(3) The increasing importance of knowledge in our society and economy also demands a shift in education systems in order to prepare students adequately to function effectively within this type of society. Cooperation of educational institutions with industry creates a new situation, where external stakeholders enter the education system and bring into it a new set of capabilities and skills that in turn are delivered to the students (Wise, 1981). As this process is bidirectional, the students also nurture the system with a different set of skills, creating more value for the system. Exposure of the educational institution to the outside world and new audience creates a possible marketing advantage, either by bringing in more students or by using innovative curriculum and cooperation to

bring more value into the system. The main influence of enterprise–school cooperation on educational marketing is the isomorphism of school governance to the business world customs and habits, together with greater accountability and "market efficiency" implied by private funding resources (Rambla, Valiente, & Frias, 2011).

(4) Accessibility, like the previous challenges, also brings new stakeholders into the system and fosters liaison with local/ethnic groups by the involvement of students in local and intercultural school events through scholarships, internships, placements, and joint research. Accessibility, as defined earlier, can be seen as a secondary challenge as this phenomenon is related to pressures of globalization and technological advancements. As the education system becomes more accessible and competitive (Foskett, 1998), more people from low socioeconomic strata are gaining access to education; the education system itself is undergoing increased stratification, for example, "choice admissions" instead of "neighborhood admissions" to schools, thus, claimed by some, leading to increased inequality (Alegre & Ferrer, 2010; Gibbons & Silva, 2006). Increased inequality has implications for the marketing strategy not only of individual schools but of regulatory authorities, to create more equal access to knowledge, thus allowing better choice for all.

(5) Quality assurance enables institutions to pursue and then market qualifications and accreditation according to confirmed quality, thus improving transparency and giving better service to the students and teachers. Quality assurance also allows prospective students to better understand the differences between various education providers, thus eventually making better choices. The increased importance of scores on national and international league tables and their effect on educational policy and schools' governance caused resource allocation to be targeted toward preparation for those exams, together with marketing efforts to publish schools' achievements to attract better prospective students.

(6) Continuous and lifelong learning creates better teachers and new generations of students, pushing all systems toward improved performance (Nelson, 2010). From the marketing point of view, lifelong learning opens the gates to all, all the time. It allows parents to study with their children, and it enhances the population of students and the scope of learning institutionally and nationally.

Education in the 21st century will continue to be commercialized and commoditized. This is an extremely complicated process with positive and negative multisystem effects. Marketing will take an important place in this environment, and the competition inside and outside the system will push administrators toward novel and innovative solutions.

SUMMARY AND PRACTICAL IMPLICATIONS

It is clear that the knowledge society is generating an increased demand for education, new and alternative types of education providers, more flexible delivery methods, and a growing emphasis on knowledge creation. Those trends are occurring in an environment of limited increase in public funding for education but greater accountability and stronger links between funding and performance.

Consequently, new models are being developed to redirect and, in some cases, reduce public funds and also to put more emphasis on using private sources for financing education. Innovation presents people with alternative tools and ways of completing everyday tasks and solving a variety of problems in ways not possible without it. This chapter presents a new framework of analysis and maps major innovations in education systems, together with classification into primary and secondary innovations. Each of the presented processes is referred to later as an influencing factor in the educational marketing field. As the education system undergoes tremendous changes, it needs to develop innovative solutions and act in innovative ways to survive and compete.

The demand for creative learning and innovative teaching from policy-makers has to be matched with a support mechanism, that is, with policies and tools that help all educational players to pursue creative and innovative paths. Besides this, policies for innovation in education need to be in line with other policies and with what is demanded from teachers and students, as contradictory messages will increase uncertainty and further impede the adoption of necessary measures for a creative learning environment. The promotion of innovation needs to be articulate and coherent, as the issue is complex and multifaceted. Moreover, policies need to be mirrored by practices, for instance, by establishing a nurturing school culture or by finding support in the availability of certain tools, in order to be applied in an effective way and to have a positive impact.

The literature widely documents the commercialization of education, and higher education organizations now place far greater emphasis on marketing as a means of business development (e.g., in Goh & Tan, 2009). The marketing management of these institutions increasingly relies on the strategies, methods, and tools that the business world has long adopted, irrespective of their profit or non-profit orientation. Correspondingly and proportionately, the need arises for education institutions to understand better their markets' needs and wants, and innovation can and should play a key role in those processes.

To summarize, this work presents a gathering and mapping of future challenges in the educational arena with a comprehensive analysis of the role of innovation and implementation in educational marketing. This work may contribute to the body of knowledge in higher education policies and might be useful for academics, students, and policymakers in the area of higher education.

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CREATING VALUE IN SCHOOL EDUCATION MARKETING THROUGH THE COCREATION PROCESS – A CONCEPTUAL PAPER

James Seligman

ABSTRACT

The purpose of this chapter is to systematically review and explore the nature of marketing in higher education (HE) and consider the creation of value through the cocreation process. The objectives of the review were: to collect, document, scrutinize, and critically analyze the current research literature on value elements in marketing and how cocreation between the sender (school) and receiver (student) happens; to establish the scope of education marketing; to identify gaps in the research literature; and to make recommendations for further research in this field.

The approach for this study entailed extensive searches of relevant business management and education databases on value-based marketing and cocreation. The intention was to ensure that, as far as possible, all

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literature in the field was identified – while keeping the focus on literature of greatest importance to the research question.

The potential benefits of applying marketing theories and concepts which have been effective in the commercial world are being adopted by researchers and managers in the field of not-for-profit education marketing. However, the literature on educational marketing is inconsistent, even contradictory, and lacks theoretical models that reflect upon the particular context of educational marketing and the use of value in the marketing of school services.

The research field of educational marketing, value, and cocreation is still at a relatively pioneer stage with much research still to be carried out both from a problem-identification and also from a strategic perspective. Despite the literature on the marketization of schools and higher education and student behavior, research does not provide evidence of the marketing strategies that have been implemented and marketing of schools remains limited, and this is relatively uncharted territory.

This chapter reviews the literature in the field, focusing on marketing strategies of value and cocreation in the competitive school market for students.

The theoretical findings suggest there is a place for value development and the use of cocreation in the marketing of schools by engaging the student in the process and providing complete transparency and a proper feedback loop. *From a managerial position, the findings present changes in* how schools should be marketed with more focus on objectives, strategies, marketing tools, staff and student engagement, and performance measures.

The overall conclusion drawn is that marketing of schools has relevance; however, the relevance is only useful if value is developed over time, and supports the school brand and the values that are associated with it in a competitive market.

Keywords: Education; marketing; value; cocreation

Schools in a competitive domestic marketplace: A process review of the literature on education marketing of schools in the United Kingdom and further afield.

INTRODUCTION

Schools in the United Kingdom are under pressure in many forms, such as reductions in funding, overhaul of the curriculum, increased competition, and the increase in student and parent voice. How well schools deal with these challenges in the future will be the difference between survival and school closure.

Research Question

To consider the creation of value in education marketing through the cocreation process.

To discuss the paradigm shift resulting in an array of newer schools during the mid-1950s, and the subsequent paradigm broadening of the most popular schools of marketing thought in the mid-1970s. Based on this historical analysis, the chapter examines the state of marketing in schools, and describes how schools could use concepts of value and cocreation in the future (Vargo & Lusch, 2008).

The research approach is to identify literature pertinent to the research question, which in turn will provide theoretical and managerial implementations on how schools should be marketed in the future.

MARKETING IN THE 21ST CENTURY

Major changes in the global marketing environment explain today's pressures for greater management effectiveness of schools. The environmental changes (Treacy & Wiersema, 1995) affect the performance of a school and there are fundamental strategic decisions which respond to the school's environment, which consider the economy, technology, political and legal aspects, culture and demographics. Rapid technological changes are reshaping how schools communicate and how this works in developing marketing strategy.

The marketing strategy is determined by the changing environment and what the organizational and stakeholder needs and wants are (Porter, 1985). Within this framework, the issue of value as a measure in marketing that can build a sustainable, competitive advantage which sees the value of the organization rise is considered. Traditionally, marketing has been seen as about satisfying the needs of the customer more effectively than competitors; this assumption has been based on satisfying a customer, which builds retention, and positive financial results will follow. Building value requires a strategy, the choosing of high-value customers (Hamel & Prahalad, 1994), and formulating differentiated competitive advantage as an appropriate marketing mix. The McKinsey 7-S framework identifies shared values of structure, systems, style, staff, skills, and strategy which are customer led. In a school environment, the marketing value drivers can be considered to be: (1) defining marketing in terms of stakeholder value; (2) how one delivers value, understanding the school's differentiated advantage; (3) understanding the role and importance of satisfaction, loyalty, and trust; and (4) essential requirements for delivering customer value.

The concept of marketing as a framework and "structurer" of the cocreation and enjoyment of value is gaining acceptance. S-D logic is based on nine foundational propositions (FPs; Vargo & Lusch, 2004). These FPs are not a set of "rules per se." Instead, they represent a developing and collaborative effort to create a better marketing-grounded understanding of value and exchange which adds value. In this chapter the focus is on "The student is always a cocreator of value: there is no value until an offering is used – experience and perception are essential to value determination in the experience phenomena." Traditionally, suppliers produced goods and services, and customers purchased goods and services. Today, customers can engage in extensive dialogue with suppliers during each stage of product design and delivery. This builds trust and understanding between the two parties; it is a partnership of building the outcome. In schools, this could be a choice of subjects which are on offer and the student may wish to study. This form of dialogue should be seen as an interactive process of learning together (Ballantyne, 2004). Choice and discussion make the student feel wanted and considered as a person, not just a number.

In the commercial world there are examples of value and cocreation, for example, Dell, who provide the customer with options to build a computer to a set of their specifications, or British Airways in terms of building a holiday. In schools and higher education, the principal service is an education which can be a collection of modules and grades; however, both types of institutions also offer support services in many cases such as forums, sport, travel, accommodation, social and cultural activity. Without partnership (institution with students), many services would not occur or develop into meaningful service experiences.

Moreover, marketing in schools has a new definition, that of the management of processes that seek to maximize returns to the school by developing and implementing strategies to build relationships of trust with high-value customers, and to create a sustainable differential advantage while delivering beyond monetary value (services, support, benefits, connection).

Value Concepts in Marketing

The value of a product or service is the mental estimation a consumer makes of it (Doyle, 2008). Formally it may be conceptualized as the relationship between the consumers' perceived benefits in relation to the perceived costs of receiving these benefits. It is often expressed as the equation:

$$Value = \frac{Benefits}{Cost}$$

Value is thus subjective (i.e., a function of consumers' estimation) and relational (i.e., both benefits and cost must be positive values). There are parallels between cultural expectations and consumer expectations.

Thus education in Japan might be focused on social and cultural perspectives, whereas in the United Kingdom the focus is on reading, writing, and arithmetic; the value in the marketplace varies from place to place as well as from market to market.

For a school to deliver value to its customers, they must consider what is known as the "total market offering" (Kotler & Keller, 2006). This includes the reputation of the organization, staff representation, product benefits, and technological characteristics as compared to competitors' market offerings and prices.

Value can thus be defined as the relationship of a school's market offering to those of its competitors. Value in marketing (Doyle, 2008) can be defined via both qualitative and quantitative measures. On the qualitative side, value is the perceived gain composed of an individual's emotional, mental, and physical condition as well as various social, economic, cultural, and environmental factors. On the quantitative side, value is the actual gain measured in terms of financial numbers, percentages, and money. For an individual to deliver value, one has to grow his or her knowledge and skill sets to show case benefits delivered in a transaction (e.g., getting paid for a job).

For an organization to deliver value, it has to improve its value:cost ratio. When an organization delivers high value at a high price, the perceived value may be low. When it delivers high value at a low price, the perceived value may be high.

The key to delivering high perceived value (Doyle, 2008) is attaching value to each of the individuals or organizations – making them believe that what you are offering is beyond expectation – helping them to solve a problem, offering a solution, giving results, and making them happy.

Value changes based on time, place, and people in relation to changing environmental factors. It is a creative energy exchange between people and organizations in our marketplace. Mintzberg (1991) defines strategy as the operationalization of a pattern of organizational decisions, which influences the operation of an organization such as an educational enterprise. However, most work on strategy has been on physical goods rather than services (Grönroos, 1980) of which an educational establishment delivers a service to its numerous stakeholders (students, parents, government, suppliers, staff, business, and charities as examples).

In work by Treacy and Wiersema (1993) on the value discipline strategy and typology, the authors review operational excellence, customer intimacy, and product leadership. In a school context, operating excellence could be defined as quality in the actual operation and excellence in delivery of education through skilled academic staff, efficiency, and streamlined operations. When this is balanced with understanding the student, nurturing, caring and facilitating the students' learning process, the typology in an educational context starts to make sense. However, there is the question of product leadership; within schools it could be argued that this is down to the curriculum and the whole experience in the classroom and at the school. The parallel with this typology is, of course, Porter's value chain model, specifically leadership, differentiation, and focus. The typology in education could also have one more element: that of cocreation of values, the collaborating of the student with the institution in the process of value creation. The study of value in marketing possibly started with work by Eggert and Ulaga (2002), although "value" has always been considered as a foundation of marketing with its emphasis growing based on the growth of the service sector of which education is a major player.

What triggered the considerable debate around value was the work by Pine and Gilmore (1999) on the experience economy, in which the authors argue that experiences would become more valuable to consumers than other brand equities such as price, quality, and reputation.

Expanding on this thinking, Hill, Roche, and Allen (2007) looked at the experience journey from the customer's position, to identify key experiences through the customers' eyes (contact, rapport, relationship).

The happier customers and staff are, the more successful the organization, where uncertainty is morphed into amazement. Weiss and Cropanzano

(1996) argue that emotional connections can be separated into two principal categories: (1) positive emotions and (2) negative emotions.

Researchers in the marketing discipline have largely adopted the appraisal theory of emotions in order to study customer emotions in service consumption and behavior as outlined by Ruth, Brunel, and Otnes (2002).

The theory outlines the ability to integrate the informational and directive roles of specific emotions into what is explained as goal-directed behavior (Bagozzi, 2000).

While much of the research has reviewed the effect of service quality, customer satisfaction, and service value on behavioral intentions across various service industries (Brady, 2005), little research exists in these areas related to UK education.

The development of customer satisfaction relies on the linkage of certain elements internally and how the customer sees value from the exchange; the points below set out the structure for the creation of satisfaction.

With the development of technology and wider choice, customers since the 1960s have become a key component in the marketing decision-making process. It has also been driven by the expansion of services to customers, with the result being a slow shift toward relationships compared with one-off transactions. Rust, Moorman, and Bhalla (2009) outline customer equity and the three main drivers:

- *Value equity* is the customer's objective assessment of the utility of a brand, based on the perceptions of what is given up for what is received.
- *Brand equity* is the customer's subjective and intangible assessment of the brand, above and beyond its objectively perceived value.
- *Retention equity* is the tendency of the customer to stick with the brand, above and beyond the customer's objective and subjective assessments of the brand.

In the marketing context, customer equity is the total of the discounted lifetime value of all customers. The customer equity model defined by the authors enables marketers to determine which of the three drivers drives customer values in a given organization.

In a commercial frame of reference, value is seen as a straightforward tradeoff between quality and the price paid (Heskett, 2002). However, this approach could be too oversimplified as debated by Cronin, Brady, and Hult (2000) and Hermawan (2001); value should be viewed as an international and multiranging component. Moliner, Sánchez, Rodríguez, and Callarisa (2007) supports this view on value, believing that otherwise it is too restrictive, as it only focuses on the economic value and not on more holistic concepts of value; a more multidimensional approach is needed.

This links skillfully with the value discipline strategy typology for education. Value as illustrated by the literature is having a broader contact than just economics, comprising the experiences of a student which drive perceptions of value in education; it is not only about memory, judgment, and reasoning, but also the feelings, opinions, and emotions of the student. Sheth, Newman, and Gross (1991) outlined the thought of a multivariant approach to value in services, and debates emotive states toward the services provided and the desire for knowledge, which supports a qualified value. This approach was used in a study of higher education by Ledden, Kalafatis, and Samouel (2007) and Brown and Mazzarol (2009) which acknowledged that stakeholders of educational enterprises are searching for value (value for money, value of the experience, and value in tangibles and intangibles). To gauge value, one could use the classic return on investment (ROI) calculation. However, it cannot measure intangible decisions to do with value, which can include the reputation of an organization, the well-being of staff, or the consequences on society or the environment at large. The access of value measuring management (VMM) in marketing is originated by developing "a framework of values," including costs, risks, tangible and intangible returns, image, brand values and reputation, then develop scores to each key element in the value framework.

Once the relative scores of the distinctive types of values are assigned and agreed, it becomes conceivable to examine alternatives and give yes/no decisions in a justly objective and repeatable manner, as KPI's have been established and one can critique progress using a range of traditional quantitative research techniques.

Value theory explores how, why, and to what extent as humans we value things, with its roots in axiology (the philosophical study of value), where each investigation of value deliberated the pluses and minuses and concepts of goodness (Rescher, 2005). In today's world value theory is more scientifically empirical in marketing, considering what people value and why they value things based on psychology, economics, and social understanding (Kohlberg, Levine, & Hewer, 1983; Weber, 1991). In the educational frame of reference, the measurement of value and value theory may well be applied quite simply by doing some primary research among the receivers and providers of value, with theory based on what values are best measured for a UK school.

An assessment of literature acknowledged that no such primary value measurement or theory on UK schools exists with a concentration on marketing in education. Values and understanding value from the student stance can create the right decisions by the school in a variety of contexts (White, 2004), where the values can fulfill a function to facilitate adaptation to the student's environment in the classroom and in educational marketing.

The significance of using well-established value scale becomes important when completing reliability and validity tests; there is evidence that the list of values (LOV) scale connects both requirements, based on research by Kahle (1996) and Kropp (2005).

The creation of "value" is the principal purpose of economic service exchange, and as schools are service operations it is the application of service competencies by a college or school that drives customer value. However, it is argued that value is created collaboratively in a cocreation relationship between the two parties (Spohrer & Maglio, 2008).

Service-dominant (S-D) logic is tied to the "value-in-use" meaning of value (Vargo & Lusch, 2008). In S-D logic, the roles of producers and consumers are not distinct, meaning that value is always cocreated, jointly and reciprocally, in interactions among providers and beneficiaries through the integration of resources and application of competences. Value is a result of operant resources provided by the educational enterprise (platforms, software, people, knowledge, services, administration, internet, and intranet) which are sometimes transmitted through operand resources or goods (Vargo & Lusch, 2004).

Thus, from this view, value is cocreated through the combined efforts of schools, employees, customers, stockholders, government agencies, and other entities related to any given exchange, but is always determined by the beneficiary (e.g., stakeholder, student, parent, etc.).

Considering the literature and value theory, it is a concept concerned with the value or worth of people or things. The worth of something may be considered in terms of usefulness or economic value (Reichheld, 2003). Value theory can also involve legal, moral, aesthetic, or quantitative value. It can involve just one type of value, or a combination of different types. It is generally accepted that values are at the root of all types of behaviors, including those that are morally, politically, or economically motivated.

Values may be held individually, socially, or both. However, in some cases, individual values may seem worthless without social understanding and acceptance. Value theory deals with examining the individual and social repercussions of values.

In psychological terms, value theory concerns the examination of the development and assertion of human values. It also concerns the study of the ways in which human beings act on values or fail to act on them.

Psychology-related value theory focuses on determining the reasons behind human preferences and choices in relation to values. Studying value theory also includes attempting to develop plausible explanations for the ways in which values may or may not govern behavior.

In sociological terms, value theory deals with the types of personal values that are commonly held within a community. It also examines ways in which certain conditions or situations may change those values. Additionally, sociological value theory is concerned with how different groups of people may believe in and prioritize values that influence how they behave in social situations.

The managerial implications of value are the need to understand the phenomena of exchange in a service setting – what the school and the student experience in the exchange. Second, value requires systems which include, people, technology, processes, objectives, and performance targets which constantly monitor and improve the service. This leads to understanding the outcomes of the service, whether it was valued by the school and the student, and if not, why not.

Cocreation in Marketing

Cocreation is described by Prahalad and Ramaswamy (2004) as "experience cocreation" (ECC). It is a major rethink of how organizations create value. ECC involves redefining the way organizations engage individuals in value creation, especially employees and stakeholders, but also considers customers, suppliers, and related other external stakeholders and communities. It is about organizations unleashing the creative energy of people by inviting and enabling them to interact with them differently.

In an educational environment, most teachers encourage students to cocreate in a class, as it is this interaction that stimulates discussion, debate, and knowledge exchange. Cocreation is the effective engagement of the student with the teacher and the institution, where ideas are expressed openly and freely.

Dynamic debate and argument can enrich the experience and drive value creation, which goes beyond the classroom in a constructive word of mouth from students to family and friends.

The experience resulting from service delivery is very much based on the fundamental interaction between the service provider and the service user (Arnold & Price, 1993; Zeithaml, Parasuraman, & Berry, 1990). The student, it is argued, performs a role in the service process, creating a quality service experience and driving productivity. In any service, the part of the student participation and the effects on satisfaction with the service can be affected by the level of student participation (Faranda, 1994). In work by Hubbert, Sehorn, and Brown (1995), the author examined low, moderate, and high participation in service delivery, with ''high'' reflecting a customer who cocreates the service product where there is active participation which guides the service. The customer inputs are mandatory and cocreation is the outcome.

Within an educational institution, active participation and student input would in most cases be seen as a favorable, as it is the exchange of debate, discussion and synthesis that drives exploration and constructs of new knowledge. The student, therefore, in participation contributes and may well be seen as (1) a productive source and (2) a contributor to quality, satisfaction, and value. The roles are normally not exclusive from each other, and behaviors and the student role may play a central element in the service transaction. In work by Silpakit and Fisk (1985) they defined the concept of individual participation with a theoretical framework from which a ''participating'' service encounter was formulated (maximizing the level of participation).

The work was rewarding in understanding how individuals participate in the service encounter, which may have relevance to an educational situation.

The concept of students as a productive resource links successfully with literature on service customers as ''partial employees'' (Bowen, 1986), where it is debated that the recipient of the service (the student in this case) is a temporary member of the organization. In recognizing that a student participates and inputs like a teacher does, which influences the school's productivity, both the quantity and quality and the resulting nature of output generated is superior (Mills & Morris, 1983). Student participation in value creation raises a range of concerns for the educational institution, as students can influence the quality and quantity of the output in a classroom. Also, the delivery system may be best isolated from a student in order to reduce uncertainty and drive peak efficiency (Chase, 1978). However, Mills and Morris (1983) and Bateson (1983) argue that services can be delivered more effectively if, for instance, a student is fully immersed and contributing to the service value creation processes.

A principal consideration with students as influential drivers of quality, satisfaction, and value is the actuality that the role of the student drives their own satisfaction and how they feel about the quality, and the service absorbed. Students who participate, it is debated, feel they are best valued and are prized. Their needs are also in some ways more fulfilled, and effective participation of students can boost the likelihood that their needs and wants will be met. This is evident in education where the service outcome is highly determined by student participation.

Productive in this debate is work by Dabholkar (1996), where the very act of participating is seen as "intrinsically attractive."

Students actually enjoy the interaction that the service provides. Enjoyment by students can be seen through their actions: (1) eagerness, (2) the hand shooting up to answer the question, and (3) begging to be chosen to respond. These are all contributors to the student experience and feeling of participation that adds value.

The role of trust enables cooperation (Fukuyama, 1996) and is a principal structural component in relations as considered by Blomqvist (2002), as it is a manifestation of confidence, which leads to cooperative behavior among students. Trust takes time to build and can be eliminated very quickly without difficulty (Robbins, Millett, Caciope, & Waters-Marsh, 1998). Trust is influenced by past experiences, and potential is there for its use in the future as a voluntary partnership, as trust is considered at a personal level which mirrors the relationship between the student and the educational institution (Marlow & Patton, 2002).

When trust is shared in value creation with the student, it fortifies cooperation, and may reduce conflict and boost the value of the partnership exchange. Tschannen-Moran and Tschannen-Moran (2010) debates "trust" as a determinant of effectiveness from a collective action, which builds communication and collaboration.

In an education classroom, for instance, performance based on trust improves high-performance student output, higher levels of satisfaction, and enhanced commitment to study. By devising trust in a classroom, the educational establishment is building psychological safety for the students so that they can express their views and opinions without feeling "put down" if they participate in classroom debate. This type of reasoning is considered in work by Edmondson (2002).

Value in a school is seen by students and other stakeholders as reliability, responsiveness, assurance, empathy, and tangibles. When this is developed using cocreation in a partnership with input from the school and the student value and cocreation come together as a powerful marketing tool which schools can adopt. Chesbrough and Spohrer (2006) have posed the question "How do people and organizations negotiate the creation of intangible assets that produce value for both?" They are investigating the cocreation of value and the notion of "value in use" that are central to the S-D logic

(Vargo & Lusch, 2004) of marketing by focusing on understanding value cocreation from the consumer perspective, especially in terms of how consumers integrate their resources in engaging in experiences.

Theoretical Implications

Value and cocreation as discussed by Vargo and Lusch (2004) have a place in a service-dominant world of which schools are considered a service in providing primarily a quality education, and second, secondary services that support students' growth and development and the school experience. Peppers and Rogers (2004) outline customer relationships and define value as a property that is developed by the school, in this case by presenting value reasons to the market. These include quality, performance, facilities, staff, range of programs, satisfaction, value for money, transparency, and trust. The constructs of value are central to modern marketing theory which schools could adopt.

In work by Spohrer and Maglio (2008), they consider ''service as a science'' where innovation is the theoretical foundation in accelerating the cocreation of value; this supports quality as defined by the student and family (Teas, 1993). The creation of value is the core purpose and central process of economic exchange. Traditional models of value creation focus on the firm's output and price.

However, there is an alternative perspective (Vargo & Lusch, 2008), one representing the intersection of two growing streams of thought, service science and S-D logic.

The theory states that (1) service, the application of competences (such as knowledge and skills) by one party for the benefit of another, is the underlying basis of exchange; (2) the proper unit of analysis for service-for-service exchange is the service system, which is a configuration of resources (including people, information, and technology) and is connected to other systems by value propositions; and (3) service science is the study of service systems and of the cocreation of value within complex configurations of resources. Value is fundamentally derived and determined in use – the integration and application of resources in a specific context – rather than in exchange-embedded infirm output and captured by price. Service systems interact through mutual service exchange relationships, improving the adaptability and survivability of all service systems engaged in exchange, by allowing integration of resources that are mutually beneficial. This argument has implications for advancing service science by identifying research questions regarding configurations and processes of value cocreation and measurements of value-in-use, and by developing its ties with economics and other service-oriented disciplines.

Managerial Implications

Engaging students in customer service creation (Wilkstrom, 1996) supports students as innovators and partners, which builds trust and involvement and therefore a partnership, as debated by Thomke and von Hippel (2002). School management has to drive transparency to ensure the public knows what it is receiving as a service. This requires school management to develop access points for the community so those open dialogues where the result was the risk–benefits equation can be evaluated. School management needs to cocreate solutions and develop opportunities where students and the community bond together in building a solid theoretical model that supports the marketing of the institution. Boyle (2007) identifies a five-stage process of brand cocreation that can be developed, identifying the various stages in which the firm or school is in control and those which are controlled by the consumers.

The author highlights the need to reconsider the role of brand managers in the brand cocreation process and identifies various gaps in the knowledge of brands and their management that have become apparent as a result of the development of the model.

Moreover, value and its cocreation need a system and process embedded in the organization, so that the exchange between the service provider and the service user can communicate and partner the phenomena. Hence, school managers need to consider the service offers and make them flexible enough that student choice of what they study becomes available from a menu of programs. By allowing a ‘‘pick and choose’’ option, the student is happier with the outcome and feels the service has been one to one, thus managers of school need to have an adaptable system and manage resources accordingly.

CONCLUSIONS

The changing nature of education (Oplatka, 2004) and how schools interact with their partners is redefining the meaning of value and the process of school value creation in marketing. Parents and others are sometimes dissatisfied with the current government-driven system (Crozier, 2000) and are going it alone. Marketing is also changing where brand values and propositions lead to school choice. By understanding the meaning of value and how it is cocreated, schools can develop unique market place propositions of value to potential students and their families. This can lead to a more one-to-one relationship being developed and a feeling of being "special" in the minds of the service users. Closer dialogue provides the school with better and a deeper level of understanding of the market, which then allows for more effective and targeted marketing.

RECOMMENDATIONS

The theories of value creation in education would appear from the literature to be a two-way exchange between the student and the educational enterprise. The attributes identified with education, specifically the high level of student involvement in the cocreation of value, would show the need to incorporate a range of measures including current and future goals and the element of emotion in creating value in educational services.

Concepts of trust and emotion and a comfortable environment drive improved performance in the value exchange within an educational establishment. The value discipline strategy typology exposed various models on the measurement of value and, in particular, the possible marketing strategy that could be adopted by institutions. Yet the varying levels of student involvement raise a number of complex questions. As the concern of student participation in the service delivery raises what role the student and the institution should play: thinking about the student experience in the cocreation of services and how various approaches may develop (partial employee position), or retention and management of the content in the service delivery are desired. The student has a function to play in the creation and development of value in the classroom and in the social and cultural environments around the educational establishment's location. Positive word of mouth to family and friends attaches value, as does the student feeling good about themselves, and having the ability of self-expression without fear. The literature advocates the student as an integral part of the system for value creation, and the student can influence where, when, and how value is originated.

There is a call for guidelines; the student requires respecting the educational institutional boundaries in the search for value and recognizing that there are multiple points of exchange where the student and the institution can cocreate. The elements of exchange need to consider: (1) how the exchange happens and is managed; (2) how choice plays a role in value creation; (3) how the consumption of the experience is staged and managed; and (4) what are the measures in value performance. From an educational enterprise marketing position, knowledge of the internal and external environments is key indicator of capacity and competitive activity.

The dialogue with the community must create a shared meaning where the messages are understood and motivate productive dialogue. The educational enterprises should have value propositions that match the needs and wants of the community, and make the institutional values unique and different from competitors. This requires access, and a policy within the school of being stakeholder-friendly and that the institutional attitude is that "we stand for something." The combination of dialogue and access can create considerable influence in a community with positive benefits to both sides of the service exchange.

Like most things, value creation needs to consider risk, and there is an obligation on behalf of the educational institution to have a well thought out plan and a clear understanding of how value will be created and delivered. This requires transparency where the stakeholders of the educational enterprise clearly understand the institution's objectives, methods, services, supports, and delivery of a valued experience.

In conclusion, one could say there is a quiet evolution taking place in education, where stakeholders demand more services and value in the experience at the institution. Students are better informed through the internet, and have a wider choice of education options, which is making education more competitive. Students may consider a cocreation of services as the norm and expect quality dialogue where they contribute in the cocreation of what is, and what not a great experience is. The marketing of education would seem to be developing. It is no longer the domain of posters, brochures, open days, and a second-rate web site. Marketing of education is now becoming strategic, where market insights through research and data mining are being used to make more effective strategic marketing decisions. The use of new technology such as the internet has a created a new access portal for the two-way exchanges of information, which supports the concepts of value through a positive experience. Educational establishments are enduring in a world of transformation, and issues of funding, increased competition for students and the ageing of the population are all putting pressures on the educational establishment. Management of education is adjusting to these new challenges with flatter structures, better leadership, and innovation. Understanding the stakeholders, particularly students, what they see as a value, and in what way value can be cocreated is an important consideration for education now and in the future, and requires further research. Those educational enterprises that can make the adjustment in this world of value creation will discover wider openings and potentially more powerful community partnerships.

IMPLICATIONS

Marketing scholars have perceived exchange as the underlying key phenomenon for desired outcomes. The proponents of the exchange paradigm seem to agree that "exchange is not an end in itself" and "that the end is need satisfaction."

The general framework for examining exchange has been exchanges and need satisfaction. The literature contends that this framework is limiting for the conceptualization of marketing.

The exchange paradigm has been questioned by marketing scholars on its ability to explain relational engagement of firms. The chapter argues that the exchange paradigm limits the perceived roles and responsibilities of both marketers and consumers, whereas these are broadened for both parties under the value creation paradigm.

In contrast, value creation for schools brings in several advantages; for example, it provides explanation for the development and growth of intra- and extra networks. Unabridged gaps in networks form structural holes. Value is created when two individuals/institutions with complementary resources are *connected*. Marketing functions (e.g., marketing mix activities, selling, marketing research) all inherently strive for value creation. The basis of society is social networks, and marketing "streamlines" these networks for value.

LIMITATIONS

The study is confined to current literature which has been systematically collected and analyzed from 1980 to 2011. It is therefore not an empirical study based on primary research; however, the chapter's foundations are rooted in work by scholars in marketing, school marketing, value, and cocreation in the commercial world.

Little theoretical literature exists on the value cocreation phenomena in school marketing presently, which is a limitation in itself; however, the chapter goes some way in filling this research gap.

FUTURE RESEARCH

The investigation of value and cocreation in school marketing would seem justified and more research is needed in the development of theoretical models for application in a school-based market.

Both qualitative and quantitative studies from the school perspective and also the student position are needed to better understand the exchange phenomena (what and why things happen).

This may lead to better structures in marketing of schools and more performance-based results from school marketing expenditure while upgrading the quality of the school marketing message.

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REFLECTIONS ON MANAGEMENT AND LEADERSHIP OF EDUCATIONAL MARKETING: LOOKING TOWARD THE FUTURE

Jane Hemsley-Brown and Izhar Oplatka

ABSTRACT

The purpose of this final chapter is to draw together the conclusions and insights presented in each of the chapters throughout the book, to summarize and categorize concisely the findings, and to offer views about the next steps in the field of education marketing. The chapter is presented under key headings which emerge from the edited book chapters: market-led leadership, building relationships, and relationship marketing. The final section discusses a way forward for education marketing research and practice.

The chapter seeks to draw together and make sense of the insights from all the chapters under key headings to provide the reader of the volume with some key ideas to take forward for practice and research in the field.

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In the final chapter we, as the editors of this volume, consider the various chapters from an integrative and reflective perspective. Interestingly, despite the positive and optimistic focus on strong leadership and building good relationships with key stakeholders, the contradictory perceptions and emerging dilemmas of education marketing provide the background and context for many chapters in this book. Marketization has introduced uncertainties and ambiguities about the role of principal and school staff (Burnell, this volume). The resistance and antagonism toward marketing in education is largely aimed at the underlying concepts of marketization (Foskett, this volume) and at the politicization of schooling, but nonetheless outdated perceptions of advertising from the 1950s and 1960s still seriously and negatively continue to influence the views of many in the education sector. The authors noted that there is skepticism and unease about marketing, particularly advertising, including criticisms of those who adopt commercial promotion techniques uncritically, or who continue to treat marketing as an add-on function rather than as strategic development (Foskett, this volume).

In this sense, marketing is considered by some practitioners to be unprofessional and the business of selling is widely rejected by many schools (Burnell, this volume). Consumerism and commercialization, where selling takes place and money changes hands, are viewed as unethical and unwelcome; thus, marketing in education continues in some contexts, particularly schools, to be highly contested and controversial (Maringe, this volume). The marketing function in many schools is still associated with manipulation, persuasion, propaganda, exaggeration, and misrepresenting what the product or service is, as well as exploiting people's vulnerabilities (Tubin, this volume). Burnell (this volume) argues that schools believe they are in a difficult ethical position because of competing sets of principles, values beliefs, and ideals, and this leads to role overload. Choice and competition are essential to successful markets, but both research and practical experience show that the market exacerbates social segregation – which is one of the key problems education seeks to address (Lubienski, Linick, & York, this volume). As a consequence, school marketing is viewed as a controversial issue in education which undermines the value of the educational process as an equal and ethical enterprise (Tubin, this volume).

Despite the challenges, increasing marketization of education worldwide, globalization, and increased pressure to develop a marketing model (Maringe, this volume) mean that education marketing as a process and practice has continued to develop and grow since the later 1980s, albeit in a climate of antibusiness, antimarketing, resistance to the commercial terminology, and the ethical- and value-based challenges concerning its relevance to education. Research reveals, however, that principals and head-teachers have continued to build strong relationships with a range of stakeholders and sustain close relationships with students and parents, despite their apparent resistance to the philosophy, mechanism, and practice of marketing.

On a more positive note, Foskett (this volume) argues that more recently the maturing of marketized education systems, the placing of market views at the heart of institutional strategies, and the refining of understanding of the focus on relationships between providers (schools, colleges, and universities) have seen the leadership and management of education marketing become a core function in almost all institutions. He argues that there are now few who do not accept that the new relationships and paradigms demanded by marketization are part of their professional obligations as teachers, academics, managers, or leaders. The battle to protect education from the challenges of the market has largely been lost, and the leaders of our schools, colleges, and universities are obliged to operate in, and be accountable to, a marketized environment (Foskett, this volume).

Managers are also increasingly aware of the need to understand and develop strong relationships with a wide range of stakeholders. As a result the leadership and management of education marketing has become a core function, and it is therefore important to focus on the development of appropriate leadership for marketized schools (Maringe, this volume). Therefore, the authors in this volume look toward market-led leadership, focusing on building relationships and relationship management as a positive and strategic approach to the challenges of an increasingly marketized education system.

MARKET-LED LEADERSHIP

Although marketization of education and the notion of marketing schools have been widely resisted, a few managers and leaders took the concept forward and developed ways of working within the new marketized system. Over time, the forces of resistance have reduced, there is more engagement with the idea of operating within markets, and new approaches to leadership and management have become embedded and normalized across the sector (Foskett, this volume). Nonetheless, not surprisingly, a focus on the ethical dimensions of leadership has now become a key theme in educational leadership and management literature (Cranston, Ehrich, & Kimber, 2004,

p. 3, cited by Burnell, this volume). One of the key challenges in adopting a marketing orientation in educational institutions is the issue of appropriate leadership and leadership style, and, to some extent, this has been more of a focus than the controversial shift toward a management culture – or a managerialist culture as some have argued. As a result of accepting and managing marketization, there is a further challenge in terms of making decisions about delegated accountability and institutional autonomy, which characterize most marketized systems. Burnell (this volume) argues that this issue immediately poses a set of further dilemmas for school leaders: how can the principal involve teachers? How far can marketing activity be delegated or distributed? We know from our own work that schoolteachers refrain from taking on marketing-related tasks not only because of their negative image in education, but also due to their professional identity which they believe educates them to teach, not to market their school (Oplatka, Hemsley-Brown, & Foskett, 2002).

In terms of the market agenda, the role of the school leader has also grown and become more complicated and more stressful as a result of marketization (Burnell, this volume). Perhaps, the role has grown and become more stressful not just as a result of marketization, but also as a result of the way that marketization has only been reluctantly accepted in the school sector. Despite the focus on management and leadership in schools, colleges, and higher education (HE) institutions, the challenges are complex and in all sectors the preoccupations are based on achievement, curriculum, admissions, widening participation, and improvements in opportunities – often at the expense of developing a strong market and marketing orientation. This is counter to the findings from research in market orientation which suggests that schools adopting the ''marketing orientation'' approach are more responsive to parents' and children's needs and desires, and attentive to changes in the community needs (Lumby & Foskett, 1999, cited by Oplatka & Hemsley-Brown, this volume).

The challenges of marketization and implementing marketing have been less contentious in further education (FE) and HE on the whole across many countries because in part students have always enjoyed free choice and governments have varied in whether they provided such education without financial contribution from families. Although there are some serious downsides to the market which are difficult to resolve, such as a fair funding policy, affordable fees, and widening participation to enable those from disadvantaged backgrounds to gain full access to FE and HE, these sectors have been quicker to embrace the market and marketing than the compulsory sector. The notion of choice in schools was more of a political and operation shift, whereas in FE and HE students on the whole were making individual choices even prior to the enhancement of the market. There was a partial market in these sectors.

Maringe (this volume) notes that although marketing has become an increasingly important aspect of the overall organization, for most educational institutions around the world its role still remains peripheral to leadership and management, curriculum, pedagogy, and classroom learning, particularly in schools where classroom learning is the critical mission of schools, identified in relation to its educative, knowledge creation (research), and enterprise purposes in society (Maringe, this volume). This is also likely to be the case for noneducational organizations whose core activity is based on the business they are in, be it technology, manufacturing, retail, or other for-profit activities. Therefore, marketing in schools should be about developing relationships with clients and constituencies in order to build the values the schools need (Maringe, this volume), and schools must understand the types of relationships they have before managing them, followed by meeting the unmet needs through working with other stakeholders and seeking to provide additional service benefits (Yang and Robson, this volume). Nonetheless, many of the relationships that a school needs to develop are leadership tasks and there are limits as to how far they can be distributed or delegated to the teaching staff (Burnell, this volume). Relationship marketing (RM), therefore, faces two important challenges in educational institutions; the first seems to be a strategic fit with the core purpose of the institutions and the second seems to be the need for strong leadership capacity to drive the agenda (Maringe, this volume). Despite these challenges, Foskett (this volume) believes that institutions must now manage their relationships with a wide range of external stakeholders, partners, and clients. Skills of external communications, building partnerships, and analyzing rapidly changing environments are now at the heart of managing institutions (Foskett, this volume).

BUILDING RELATIONSHIPS

By mid-1990s the conventional marketing mix paradigm was joined by a new phenomenon (Sheth & Parvatiyar, 1995, cited by Burnell, this volume), based on the building and management of relationships rather than "selling" or "branding" (Grönroos, 1994, cited by Burnell, this volume). RM seems to be ethically more in tune with the views and values of teachers. Hartley (1999, cited by Burnell, this volume). Oplatka and Hemsley-Brown (this volume) point out that marketing aims at improving effectiveness through the satisfaction of parents' needs and desires rather than just mere selling of products and services or persuading clients to buy a specific educational program. In other words, marketing is another managerial philosophy based on the ideal relationships between the school and its community. RM puts emphasis on nurturing relationships, especially with existing customers, and developing supportive market networks.

However, although this approach to marketing is far more acceptable to those in education – who focus first and foremost on the student – it was transactional marketing, not RM that leaders and teachers of schools, colleges, and HE institutions first concluded was meant by "marketing," an essential task in response to operating in a market. The transactional approach to marketing is the approach that receives the greatest criticism in an education context. Transactional marketing, which focuses on sales, single transactions, advertising to promote product features, limited commitment to meeting customer needs, and little or no emphasis on quality and service, is quite different from RM, which focuses on customer orientation, continuous contact with customers, customer value, long-term relationships, with a high emphasis on quality and customer service (Payne, Christopher, & Peck, 1995). Marketing approaches have shifted from emphasizing transactions with anonymous customers to developing and managing relationships with identified customers (Grönroos, 1997; Sheth & Parvatiyar, 2002, cited by Tubin, this volume). This approach is not so revolutionary: although RM practice is regarded as new, it is actually an old phenomenon of building and maintaining relationships, a practice that educational leaders have long perceived as their responsibility (Drysdale, 1999; Oplatka, 2007, cited by Tubin, this volume).

A RM approach is one which seeks to utilize relationships to add value, which is created through the establishment of mutually beneficial relationships between managers (Stachowski, this volume). Tubin (this volume), however, believes that by 2009 marketing has begun to be perceived in terms of lasting relationships between partners (McLaughlin, Osborne, & Chew, 2009, cited by Tubin, this volume) and she claims that to sustain school success, the ability to develop network relationships grounded in mutual support, care, trust, and consensus is significant (Giles, Jacobson, Johnson, & Ylimaki, 2007, cited by Tubin, this volume). Interestingly (and counterintuitively) concern about the alien concept of pure competition can be met through a more collaborative RM approach because managing external relationships well can provide an organization with a competitive advantage (Berry, 1995; Morgan & Hunt, 1994; Srivastava, Fahey, & Christensen, 2001, cited by Yang and Robson, this volume).

Although some researchers have explored RM in the education sector (e.g., Helgesen, 2008, cited by Stachowski, this volume), the majority have focused on the relationships between educational institutions and their students rather than looking into the complex relationships schools have with other individuals, organizations, and other entities as external stakeholders (Yang and Robson, this volume). Whereas many writers list some of the stakeholders schools seek to build relationships with, Yang and Robson (this volume) draws up a matrix of four quadrants to identify the key relationships schools have: supplier/resource generators; lateral partnerships/regulators; internal/staff and management; and buyer/service users. She argues that it is only by understanding the range and type of relationships that schools have that managers can then begin to understand how to manage and develop them effectively. She further explains that the partners quadrant is concerned with regulation and that some of the relationships are essentially mandatory (e.g., local government) but for others engagement can be optional (e.g., community groups) – the complex nature of the relationships schools have and the challenges schools face in managing and developing these relationships are also highlighted, implying for the new skills current principals need in order to run their schools effectively. Added to this complexity is the changing nature of the relationships themselves which will vary by school, context, and over time (Yang and Robson, this volume), but all relationships need to be developed and managed. This can be achieved through a RM approach.

RELATIONSHIP MARKETING

Authors in this volume tend to conclude, therefore, that of all the available marketing approaches, RM seems to be that most widely accepted and developed in educational institutions (Maringe, this volume) – even though the activities are often not called "marketing" or even "RM." Although Maringe (this volume) believes that RM is still a "marginal activity" in schools compared with curriculum, pedagogy, and classroom learning. This is because schools, as a consequence of marketization and increasing globalization, now work with multiple organizations and partners to create the value they need and to meet the goals they set for themselves and goals set by others. Thus, Yang and Robson (this volume) claims that establishing

RM in schools should not be hard work because much of the current activity in schools is part of a RM approach. Tubin (this volume) explains that teacher–parent relations become RM when they meet three unique criteria: a one-to-one relationship, an interactive process, and a value-added activity through collaboration (Sheth & Parvatiyar, 2002, cited by Tubin, this volume). This is familiar territory for schools. Not every contact with a parent is RM; however, it is only ongoing collaboration that empowers parents and teachers alike and RM even at its best might be instrumental in its purpose (Hartley, 2008, cited by Tubin, this volume).

RM is not a competitive activity in itself – it is a win–lose situation. A school, as an organization that lies in the middle of so many obscure and sometimes contradictory expectations, which has to operate with so many partners to attain so many goals, must maintain good relations with its partners (Yang and Robson, this volume). Cooperation, commitment, trust, and loyalty are considered to be key components and outcomes of RM (Morgan & Hunt, 1994; Palmatier, Dant, Grewal, & Kenneth, 2006) (Tubin, this volume). Surely few heads could disagree with this approach, even though they might not agree with all the terminology.

WHAT WE KNOW, WHAT WE DON'T KNOW, AND WHAT DO WE STILL NEED TO UNEARTH

In the final pages of this compiled book, we would like to briefly summarize the insights we gained from reading the varied chapters and the literature about educational marketing. No doubt, the research on educational marketing has increased considerably since the appearance of the first studies about promotion, marketing, and public relations, first in HE, and later in schools. We now know that:

- There is skepticism and unease about the incorporation of transactional, business-like marketing, particularly advertising, into schools and education.
- The marketing function in many schools is still associated with manipulation, persuasion, propaganda, exaggeration, and misrepresenting what the product or service is.
- Education marketing as a process and practice has continued to develop and grow since the later 1980s, albeit in a climate of antibusiness,

antimarketing, resistance to the commercial terminology, due to high levels of marketization and commercialization in education.
- Marketization has introduced uncertainties and ambiguities about the role of principal and school staff.
- Over time, there is more engagement in schools with the idea of operating within markets, and new approaches to leadership and management have become embedded and normalized across the education sector. But at the same time, the focus on the ethical dimensions of educational leadership working in marketed environments has increased.
- Of all the available marketing approaches, RM seems to be that most widely accepted and developed in educational institutions, even though the activities are often not called "marketing" or even "RM."

It is apparent that much of the knowledge about educational marketing we know today has been accumulated during the last two decades. There is a sense among researchers in this field of study, however, that as far as the school organization is concerned, the research about educational marketing has not provided us with many new insights during recent years, mainly because schools' modes of responses to their marketized, competitive environment have been routinized. Thus, new works about school marketing (as opposed to HE marketing) have been very scant recently, and, therefore, the research on this arena of marketing needs new and challenging perspectives and lines of study.

We, therefore, offer two solutions. First, there is a need to recruit new academics from the area of marketing into departments of educational administration who will bring new ideas and perspectives for studying educational marketing developed in the discipline of marketing in recent years. This may revive the field and incorporate new ways of thought and study into current research on school and HE marketing. Second, school and HE marketing should go hand in hand in the attempt to institutionalize educational marketing as a subfield of both marketing and education, because there are more commonalities than distinctions between these two streams of study. Both areas of study could benefit a lot from this intellectual cooperation and create a line of study commencing in the kindergarten level and ending in graduate studies.

Visiting schools that need to compete for prospective students and increase their public image convince all of us that it is important to study and write about educational marketing that result in practical guidelines and insights for practitioners in educational institutions. Further research in the field of educational marketing, particularly in schools, is still needed to find out the current state of things in terms of how marketing is engaged within what appears to be a strong climate of antimarketing. Broadly – what is the nature of the marketing activity in schools, and does this take place in a climate of ethical concern and antimarketing? Is education marketing going on but under another name? Are managers and teachers in education carrying out marketing in practice but still challenging the ethics of what they do? What is the nature of marketing activity going on in schools and how do those in schools articulate what they are involved in? Are those who raise deep concerns about marketing actually involved in marketing, or are those involved in marketing only those who are persuaded of the benefits? Are marketing activities given a more "acceptable" label? Thus, a more detailed and realistic picture of what is happening in a variety of schools in a variety of competitive environments might help to extend our understanding of how marketing is working in schools today. These practical needs urged us to edit this compilation to allow both scholars and practitioners to increase and update their knowledge in the emergent field of educational marketing. However, there is clearly still research to be carried out in terms of addressing and exploring the antimarketing stance in a context of good RM practice.

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AUTHOR BIOGRAPHIES

Tristan Bunnell began teaching International Baccalaureate economics at the International School of London in 1990. He is currently head of economics at the Copenhagen International School. He was awarded his MA in school marketing and development from the University of Surrey in 1993. He obtained his doctorate on 'public relations activity as an indicator of the unique nature of international schools' from the University of Southampton in 2003. He has published a number of articles about distributed leadership, marketing strategy and public relations activity in international schools. His current research interests include global curricula developments, especially the growth and development of the International Baccalaureate.

Nick Foskett is Vice-Chancellor of Keele University in the United Kingdom. Previously he was Dean of the Faculty of Law, Arts and Social Sciences at the University of Southampton, where he was also Professor of Education and, previously, Head of the School of Education. His academic expertise lies in the field of educational policy and leadership. His internationally recognised research has considered a number of specific themes:

- The marketisation of education
- Education marketing
- Educational and career choice processes by young people
- The management and leadership of schools, colleges and universities
- The interface of government policy and the management of educational institutions
- The internationalisation of higher education
- Capacity building in universities in the developing world

His work in these fields has included many national and international invitations as a keynote speaker, and work as a consultant to government both in the United Kingdom and overseas and on the development of policy in fields such as HE fees, widening participation and educational careers advisory systems. This has led to strong international links in Australia, China and the countries of southern Africa. He has been joint editor of the Commonwealth's journal in the field of educational leadership, *International Studies in Educational Administration*.

Jane Hemsley-Brown is associate dean (international) and reader in marketing at the University of Surrey Business School, Guildford, UK, and is one of the founder members of ICHEM. Jane is the author of over 70 papers and articles on decision-making, and choice in education markets and management decision-making, including the book *Choosing Futures, Young People's Decision-Making in Education, Training and Careers Markets*, co-authored with Professor Nick Foskett. Jane is also co-editor of the *Journal of Marketing for Higher Education* with Professor Anthony Lowrie of Minnesota State University, Moorhead, US. Prior to working at Surrey Business School, Jane worked in the School of Education, at the University of Southampton, UK as senior researcher and lecturer; and as principal researcher with the National Foundation for Educational Research (NFER) Slough, UK. Her joint paper *Universities in a Competitive Global Marketplace: A Systematic Review of the Literature on Higher Education Marketing* with Dr Izhar Oplatka (University of Tel Aviv, Israel), published in the *International Journal of Public Sector Management*, is among the journal's top most-downloaded papers.

Matthew Linick is a doctoral candidate in Educational Policy Studies division of the Education Policy, Organisation and Leadership Department at the University of Illinois Urbana-Champaign. His research interests are in educational finance, educational policy and the effects of charter school competition on district-run public schools. Prior to graduate studies, Matthew taught English and reading at the high school level. He holds a BA in English education and a MEd in instructional leadership: language, literacy, and culture from the University of Illinois at Chicago.

Christopher Lubienski is associate professor of education policy, and a fellow at the Forum on the Future of Public Education at the University of Illinois. He is also a fellow with the National Education Policy Center at the University of Colorado. His research focuses on education policy, reform and the political economy of education, with a particular concern for issues of equity and access. He has been examining organisational responses to competitive conditions in local education markets, including geo-spatial analyses of charter schools in post-Katrina New Orleans, and research on innovation in education markets for the OECD. He was recently named a Fulbright senior scholar for New Zealand, where he studies school policies and student enrolment patterns. He has just embarked on a three-year project on intermediary organisations' ability to influence the use of research evidence in the policy-making process. He has authored both theoretical and empirical journal articles on questions of innovation and achievement in school choice systems. In addition to *School Choice Policies and Outcomes: Empirical and Philosophical Perspectives* (with Walter Feinberg, SUNY Press, 2008), Lubienski recently published *The Charter School Experiment: Expectations, Evidence, and Implications* (with Peter Weitzel, Harvard Education Press).

Felix Maringe is currently professor of educational leadership at the University of Witwatersrand Johannesburg in South Africa. He worked previously at the University of Southampton in the United Kingdom and has developed a portfolio of research and teaching around the marketing of education in the university sector. He has wide ranging publications in the marketing of universities, internationalisation and globalisation of higher education and leadership of tertiary institutions in a globalising world. Currently he is working on the theme of accountability in South African schools, with a specific focus on leadership for market accountability.

Izhar Oplatka holds a PhD from The Hebrew University of Jerusalem. He is associate professor and head of the Executive Program of Educational Administration and Leadership at The School of Education, Tel Aviv University, Israel. Dr Oplatka's research focuses on the lives and career of schoolteachers and principals, educational marketing, gender and educational administration, and the foundations of educational administration as a field of study. His most recent books include *The Legacy of Educational Administration: A Historical Analysis of an Academic Field* (Peter Lang Publishing, 2010); *The Essentials of Educational Administration* (Pardes Publisher, in Hebrew, 2010); *Women Principals in a Multi-Cultural Society* (with Rachel Hertz Lazarowitz, Sense Publisher, 2006). Dr Oplatka's publications have appeared in varied international journals including *Educational Administration Quarterly*, *Journal of Educational Administration*, *Educational Management Administration & Leadership*, *Comparative Education Review*, *Teacher College Record*, *Canadian Journal of Education Administration and Policy*, *International Journal of Leadership in Education*, *Journal of Education Policy*, *School Leadership & Management*, *Urban Education*, *International Journal of Educational Management*, and so forth.

Julie Robson is head of Department of Strategy and Marketing at the Business School, Bournemouth University. Julie has over 20 years of experience in services marketing, both as an academic and practitioner. Her interest in this sector started with her PhD which examined the marketing strategies of building societies. A career in the insurance industry then followed where she worked in a range of management roles including marketing, relationship marketing, new product development and research. More recently Julie's research has been extended to include other service sectors, including education. Her current research interests include relationship marketing and service quality in both business-to-business and business-to-consumer contexts. Julie teaches global services marketing and financial services marketing on the MBA, she also supervises doctoral students, particularly in the area of services marketing.

James Seligman is principal teaching fellow in marketing in the Marketing Subject Group within the Management School, Management and Law Faculty, University of Southampton.

His role includes being the director of the well-respected MSc in marketing management using the New DNA of marketing process an innovative new form of marketing theory and practice. He lectures on measuring marketing effectiveness (metrics), delivering the value propositions (value drivers), strategic marketing intelligence (research methods), organisations in context (environments), channel management, branding.

He has a MA in marketing, BSc in business administration and research, BA in education and psychology and is fellow of the Chartered Institute of Marketing and the Chartered Institute of Advertisers; Jim is currently a research students doing his PhD due for Viva in May 2012, the thesis being on 'Customer Experience Management in UK Higher Education' using case studies. Jim is also a fully trained business coach and NLP practitioner.

He has over 35 years of marketing and senior level management experience in blue-chip multinationals in industry sectors of Business; Personal Products; Sporting Apparel & Goods; Games & Toys; Technical Outdoor Apparel & Equipment; and Sport Event Management. Jim began his career at Coca-Cola AMATIL and worked for the Coca-Cola Company. He later worked as operations director for Pepsi Co; group marketing director for Beecham; worldwide president for Speedo (where his team quadrupled worldwide sales and profits within seven years) and VP international operations and CEO Europe at Timberland (where he lead the restructuring of European operations saving six margin points). As CEO and owner he completed his own company AIM listing (oversubscribed) and has consulted on numerous MBI/MBO/BIMBO type deals; CEO stage one and the 2002 Commonwealth Games. During his career, Jim has won two gold export awards, and numerous awards for outstanding marketing campaigns, new product development and design.

Some ten years ago he started lecturing in Management; at Derby University, and then worked as Curriculum Area Manager Marketing (including all CIM programmes); Head of Development (Inc the SMART Women Project) for the Cornwall Business School; He joined the School of Management, University of Southampton in January 2008.

His current interests are CRM and CEM; of higher education; development of the marketing DNA model; intelligence and customer insight, value propositions in brand; technology in marketing, experience and co-creation.

Christopher Allen Stachowski is currently a doctoral candidate at the University of Otago. His research compares international marketing strategies being implemented in private versus public educational organizations, considering the influence of national culture on marketing strategy in international education.

He is currently a Programme Manager of Business Studies at Whitireia Community Polytechnic in Wellington, New Zealand. Before this, he spent nearly ten years as an adult educator working with migrants, and a number of years as an analyst in a government agency.

Dorit Tubin, PhD, educational sociologist, is a senior lecturer at the Department of Education, Division of Educational Administration, and the head of the Center of Promotion of Professionalism in Education, Ben-Gurion University of the Negev, Israel.

Her main interest is educational organisations (schools, universities), the mechanisms that explain their behaviour and the factors that enhance and hinder their improvement. Her current researches include the successful school leadership, organisational structure and marketing, innovative learning environments and the interactions between schools and national identity.

Hsiao-Pei (Sophie) Yang is a senior lecturer in marketing and advertising at Coventry University Business School. Sophie completed her PhD at Bournemouth University in 2008, and prior to her career in academia, she held marketing posts in the direct marketing sector and private educational sector. Her research interests include marketing of higher education and consumer behaviour in services. The previous research work she did was on business-to-business relationships between UK universities and their Chinese educational agents and international students' use of online discussion forums to reduce perceived risks in selecting overseas universities. One of the current projects she is conducting is on the internationalisation of UK universities through working with overseas academic partners, focusing on the business-to-business relationships and the power and dependency relations. Her teaching responsibilities include services and retail marketing, contemporary issues in marketing and principles of marketing at undergraduate and postgraduate levels.

Miri Yemini is lecturer and researcher in School of Education at Tel Aviv University. Her main interests are in research of entrepreneurship and innovation in education system, internationalisation and education for socially excluded populations.

J. G. York is a doctoral candidate in the Philosophy of Education division of the Education Policy, Organisation and Leadership Department in the University of Illinois, Urbana-Champaign. His dissertation examines the educative nature of humour, exploring what humour can teach us about our interactions with others and the world around us. He is co-editor of *Leo Strauss, Education, and Political Thought* with Michael Peters, as well as author of several articles covering such topics as liberal education, multiculturalism and laughter.

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