

Critical Education Leadership and Policy Scholarship

Endorsements

The UK has just ushered in a landslide political tsunami under the simple slogan change. This book is a clarion call and a harbinger for a paradigmatic change in a new critical research methodology in education leadership and policy scholarship.

—*John Smyth*,
Emeritus Research Professor, Federation University Australia &
Editor *Critical research and theorizing* (DIO Press, 2021).

Critical Education Leadership and Policy Scholarship: Introducing a New Research Methodology

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Emerald Publishing Limited
Emerald Publishing, Floor 5, Northspring, 21-23 Wellington Street, Leeds LS1 4DL.

First edition 2025

Editorial matter and selection © 2025 Steven J. Courtney, Paul W. Armstrong, and
Amanda McKay.

Individual chapters © 2025 The authors.

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British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British Library

ISBN: 978-1-83549-473-8 (Print)

ISBN: 978-1-83549-472-1 (Online)

ISBN: 978-1-83549-474-5 (Epub)



INVESTOR IN PEOPLE

The editors would like to dedicate this book to the field of critical education leadership and policy studies, whose members have inspired and sustained us.

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Introduction

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Introduction

The field of critical educational policy and leadership studies (CEPaLs) is a vibrant and vital space for academic scholarship (Courtney, McGinity, et al., 2018; Courtney, Gunter, et al., 2021; English, 2022; Mifsud, 2023). Yet research in this area remains disregarded in policy and practice circles in favour of functionalist approaches, underpinned by positivism, that are manifested through the vast and dominant fields of educational effectiveness and improvement (Gunter, 2016, 2023). The reasons for this marginalisation have been the subject of much debate but include an oft-levelled critique that research within the CEPaLs domain is deterministic and more concerned with identifying issues than finding ways of addressing them (Molla, 2021; Skerritt, 2023). In response, critical scholars argue that functional research into educational leadership, management, and administration (ELMA) is characterised by reductive, decontextualised and atheoretical approaches that generate simplistic solutions to complex social problems (McGinity et al., 2022; Mifsud, 2023). Such arguments are not new. Indeed, as Ribbins (1993) reminds us, they can be traced back half a century to Thomas Greenfield's rejection of the positivist tradition within which ELMA researchers were then predominantly located. It has been argued that this controversy marked the field's first epistemic dispute, the legacy of which continues to influence academic debate in mainstream and contemporary educational leadership scholarship (Evans, 2022).

Our motivation to bring together this edited collection was informed by these ongoing debates and, in particular, what we identify as the necessity for a new approach to researching education leadership from a critical perspective. The reasons for this are twofold. First, there is a need to address the inadequate nature of existing and dominant forms of research (and therefore knowledge production) in this area of the field. This is a concern regarding the broader field of ELMA studies and the prevailing functionalist discourse that characterises much of what is produced within this space. Second, we contend that CEPaLs has hitherto relied foremostly upon methodological tools – policy scholarship – developed and located in the field of education policy. The challenge here is that

**Critical Education Leadership and Policy Scholarship:
Introducing a New Research Methodology, 1–4**

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doi:[10.1108/978-1-83549-472-120241001](https://doi.org/10.1108/978-1-83549-472-120241001)

such approaches are aimed primarily at conceptualising policy processes, with leadership underplayed.

In our attempts to open new avenues of thought within the crowded space that is ELMA, we are acknowledging of and indebted to those scholars whose *critical* work in this sphere inspires, informs and tests our thinking (e.g. Thomas Greenfield, Peter Ribbins, John Smyth, Helen Gunter, Pat Thomson, and Scott Eacott). The book is therefore contemporary while, at the same time, located firmly in the field's existing and historical knowledge base and thus aligned to our contention that to both understand the current state of a field and move a field forward, it is also necessary to understand that field's history (Gunter, 2016). Helen Gunter's work is of particular relevance here given her status as the primary historian of ELMA studies (Fitzgerald & Courtney, 2023). In her book *An Intellectual History of School Leadership Practice and Research* (Gunter, 2016), she provides a comprehensive and interrogative account of ELMA studies and, in doing so, documents the evolution of CEPaLs as an influential network and site of research and practice. In the context of this edited collection, CEPaLs is significant because of its established association with the University of Manchester and, in particular, the Manchester Institute of Education, where the network has been centred for the last two decades, originally as CEPaLs and latterly under the renamed Critical Education Leadership and Policy (CELP) research and scholarship group.

The contributors to this collection are all located in the Manchester Institute of Education, are members of CELP and include senior colleagues within the professoriate, mid- and early-career academics, and doctoral researchers. The book therefore not only showcases the advancement of a new methodology for exploring education leadership from a critical perspective but also exemplifies CELP scholarship in various ways, both empirical and conceptual. In the opening chapter, Steven Courtney provides a scholastic warrant for and an elucidation of this proposed new methodology for researching education leadership and policy. This chapter is significant because it provides a frame for the other chapters and a lens through which these contributions should be read. As such, we recommend that this chapter is read first. The remaining chapters traverse a diverse terrain that reflects the myriad research agendas, education sectors and contexts represented within CELP at the Manchester Institution of Education. These contributions can be read individually or collectively in any order. Following Courtney's chapter, Belinda Hughes explores what she labels 'a crisis of truth-telling' in politics and the means by which education leaders must therefore navigate knowledge through truth seeking. Hughes draws on Arendtian thinking to illuminate her argument. In the next chapter, Mark Innes draws on empirical data from research with multi-academy trusts (MATs) in England to consider how MAT structures can inhibit policy enactment among school leaders with particular roles. Using Stephen Ball's work on policy actors, Innes goes on to demonstrate that these individuals can subsequently become critically misaligned and positioned as 'policy outsiders' within their institutions. In the subsequent chapter, Joanne Doherty offers a critical exploration of the mutual entanglement of education leadership and policy through the prism of parent governance within schools. Drawing on Foucault's tools of governmentality and surveillance, Doherty considers how the

process of becoming a school governor can influence parental agency and action. In the next chapter, Zeya Li turns our attention to the roles of women in higher education leadership positions in China. Drawing on empirical data, Li focuses specifically on the structural barriers faced by women leaders in this sector within the context of a policy discourse that privileges innovation as a measure of performance and therefore a means of academic promotion. This pervading leadership discourse, she argues, is underpinned by masculine values and prerogatives and thus in conflict with female identity. Sarah Bibi and Stephen Rayner then explore the live issue of teacher well-being within schools. Drawing on thinking from the field of positive psychology, Bibi and Rayner interrogate how national education policy, designed to shape the dispositions and attitudes of educators, can compromise the role of school leaders in facilitating the conditions in which teacher well-being is positively addressed. Returning to the domain of education governance, in her chapter, Karen Healey draws on Bourdieu's theory of *field* to critically examine the legitimisation of corporate practices within the MAT system in England and how this serves to secure parental engagement as a corporate activity. In the next chapter, Craig Skerritt explores the challenges of using policy narration as a method of data generation with school leaders. Revisiting and re-analysing his own empirical data in this space and utilising Stephen Ball's work on policy actors as a reference point, Skerritt makes a case for social researchers to be more mindful of the data they generate, analyse and present when using this method. Pinyan Lin authors the next chapter, in which she focuses on system leadership within China through a conceptualisation of the executive principal role within formal school partnerships in this context. Lin draws on and recontextualises Foucault's theory of *pastoral power* as a lens to interpret the practice of these senior leaders to show how they locate and are shaped by their roles within broader, pre-existing power structures. In the penultimate chapter, Alex Gardner-McTaggart confronts fundamental questions relating to who is doing education leadership and for what purpose. Drawing on education policy in England as a case, he uses Helen Gunter's work to examine the appropriateness of 'leadership' as a term to describe what he refers to as 'the administration of an ideologically directed world'. The final chapter is authored by Claire Forbes and Kirstin Kerr, who focus on research–practice partnerships (RPPs), a concept that advocates for the participation of multiple and diverse actors within the process of knowledge production when doing research in hyperlocal contexts. Drawing on Engeström's concept of expansive learning, Forbes and Kerr argue that hyperlocal RPPs are well positioned to reimagine and enact policy in ways that creatively unite diverse stakeholders' endogenous knowledge of their neighbourhoods and communities, with researchers' exogenous knowledge – both theoretical and empirical. The final (after)word belongs to Helen Gunter, whose work remains both inspiring and challenging to those of us doing critical scholarship. Here Gunter provides a set of provocations for the field and some propositions for the CELP research agenda moving forward.

We hope readers will enjoy reading and reflecting on the chapters within this collection and, more importantly, engage critically with the methodologies, ideas and arguments presented forthwith.

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Chapter 1

Adumbrating Critical Education Leadership and Policy Scholarship as a New Research Methodology

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Abstract

In this chapter, a new methodology is adumbrated for critical scholars who research education leadership. It is argued that this new methodology is necessary for two main reasons. The first is the epistemological inadequacy of dominant functionalist education-leadership methodologies. The second is the way in which the dominant critical methodology in the critical part of the field – policy scholarship – does not enable an explicit focus on education leadership but relegates it conceptually to a by-product of education policy. This enables those critical scholars who see leadership as a ‘tainted’ concept to avoid or deny it altogether. The methodology proposed here is called critical education leadership and policy scholarship (CELPS) and comprises six features: (1) it is epistemologically critical, that is, it focuses on context and power from a post-positivist perspective. (2) CELPS locates and works with education policy in diverse contexts, including the ideological, historical, political, discursive, socio-economic, axiological and cultural. (3) CELPS understands education leadership and policy as mutually constitutive. (4) CELPS enables the ontological deployment of the terms leader and leadership without committing to a project of reification. (5) CELPS requires the explicit theorisation and/or conceptualisation of its objects and assumptive architecture. (6) CELPS makes room for new or diverse approaches, agendas, methods, aims and foci. This chapter makes an important contribution to the critical field’s capacity to

**Critical Education Leadership and Policy Scholarship:
Introducing a New Research Methodology, 5–22**

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doi:[10.1108/978-1-83549-472-120241002](https://doi.org/10.1108/978-1-83549-472-120241002)

address extant and emergent problems in education empirically, as well as conceptually.

Keywords: Education leadership, management and administration; education policy; policy scholarship; methodology; critical research; critical education leadership and policy scholarship

Introduction

In this chapter, I adumbrate a new methodology for researching education leadership, which I call critical education leadership and policy scholarship (CELPS). This methodology is intended to enable critical research into a construction of education leadership that is explicitly co-constituted with education policy. CELPS is novel in promoting an expansive understanding of educational leadership as both structured by and also as structuring education policy (Bourdieu, 1977). The approach, following Smyth (1989), is critical in three ways. The first lies in its insistence that context must be taken seriously. In this sense, it speaks to Alvesson and Deetz's (2021) concern that critical research should acknowledge 'the influence of history, culture, and social positioning on beliefs and actions' (pp. 5–6). Second, it addresses explicitly how power functions through social relations constructed as or mediated by education leadership and with what effects. This, despite mischaracterisations in the literature (e.g., Evans, 2022b), is not reducible to a narrow focus on the politics of oppression but also enables projects that problematise and challenge doxic assumptions sustaining the features, objectives and mechanisms of the social world and its actors. Third, my approach intends that CELPS either explicitly mitigates or establishes the conceptual or empirical conditions for further research to mitigate any disadvantage conferred by these identified power relations.

The space occupied by critical scholars in the field of educational leadership, management and administration (ELMA) that I have targeted was described by Gunter in her 2016 book, *An Intellectual History of School Leadership Practice and Research*. There, she mapped critical knowledge-production traditions and typical tools, noted the key networks and elucidated how critically oriented purposes differ from those motivating the functionalist, school effectiveness and improvement part(s) of the field. In this chapter, I intend to build on Gunter's (2016) insights by elaborating from this *space* a distinctive and novel *methodology* specifically for investigating the co-constitution of education leadership and policy. I show the distinctiveness of my proposal in comparison to another important contribution in this area from Eacott (2015), whose methodology, *relational leadership*, speaks to some of the concerns I raise here. This chapter therefore makes its methodological and conceptual contributions by providing the critical part of the field with a new way of understanding, framing and investigating education leadership. Through this, it responds substantively to one of the most significant critiques levelled at critical research in education leadership, that is,

that it is ‘a “talking shop” that is big on ideas, and vociferous in highlighting the limitations of mainstream leadership-related scholarship, but short on specific proposals for practical ways of addressing them’ (Evans, 2022a, p. 343).

The ‘Problem’ with Current Methodologies

Dominant methodologies in education leadership studies are inadequate, either because they are located in functionalism and so are designed to perceive a social world misrecognised as external to the researcher (see Courtney et al., 2017; Eacott & Riveros, 2021) or because they are located in a critical tradition that treats leadership as inherently ontologically, ethically and politically suspect. I will address each of these in turn.

The Inadequacy of Functional Approaches to ELMA

Most education leadership studies are functionalist (McGinity et al., 2022), meaning that they are located epistemologically in positivism. They therefore assume that an objective social reality exists which can be captured, measured and intervened upon by researchers who are extrinsic to that reality. These interventions are most commonly concerned with the removal of identified dysfunctions, or barriers; with maximising outcomes; or with rendering organisational processes (mischaracterised as ‘educational’) more effective and/or efficient. Potential confounding factors in these research processes include so-called researcher ‘bias’, poor sampling or faulty research instruments or even the use of theory: all these are constructed as potentially contaminatory ways in which a supposedly external and objective social world may be accessed. The externalisation of the subject to the social world in positivism promotes psychologised, individualised ways of understanding reality, in which context is reduced to a variable (Eacott & Riveros, 2021). Together, these constitute a continuing quest to understand ‘what works’ in order to raise pupils’ attainment. Functionalist education-leadership research consequently conjures causal relationships between individualised variables such as ‘leadership traits’ and their ‘effects’ in this attainment. Education policy, in this framing, is simply another variable or at most a ‘context’. This approach characterises most school-improvement research but is invoked even more commonly (and in other epistemic communities) through such terms as the ‘policy landscape’; this framing separates the foregrounded leader from policy-as-backdrop. In school-improvement research, it conjures leaders as discrete, unitary entities who may implement policy, or not, but whose essential self is unchanged through their encounter with it.

For critical researchers, this construction of social reality does not stand up to scrutiny. We insist that as researchers, we are located within and contribute through our practice and understandings to the repeated construction of the social world we are investigating. An interview, for example, reveals not any extrinsic reality but rather materialises and instantiates the experiences, attitudes, power relations and attempts at meaning-making uniquely produced by those particular two people interacting in that moment. That which positivist

researchers call ‘bias’ is therefore an integral feature of, rather than a superable problem in research, because it refers merely to one of the inescapable conditions of being human, that is, that one brings one’s history and dispositions to the act of research. Relatedly, far from being ideally theory-free, researchers’ ‘methodology at once emerges from and is constitutive of theory’ (Eacott & Riveros, 2021, p. 184), because the theory is the vital assumptive ‘architecture of ideas’ (Anyon, 2009, p. 3) that enables us as humans to make meaning, rather than a procedural pollutant.

Critical Suspicion of Leadership

The second source of methodological inadequacy is a product of the significant strand within the critical field that treats the very concept of leadership as an object not just of scepticism, which indicates a healthy field, but of danger and/or uselessness, which I argue may impede the field’s development. For some scholars in this latter camp (e.g. O’Reilly & Reed, 2010; Ozga, 2000), using the language associated with dominant, functionalist discourses of leadership, or what O’Reilly and Reed (2010) call ‘leaderism’, inevitably reifies a concept whose dismantling they demand. Prohibited language includes ‘such linguistic terms [as] “leaders”, “leadership”, being “led”, and “leading”’ (p. 963), which are arguably fundamental to the field. Adopting this terminology, for these researchers, means more than discursive reproduction; it means working with a ‘hollowed out’ version of richer concepts that formerly were ‘central ... in the organisation of public life (for example, citizenship, equality, justice, professionalism, administration/management)’ (Ozga, 2000, p. 355). In other words, the concept of leadership is no longer adequate to the task that critical researchers require of it.

This immanent tension, or the *taint of leadership*, has profoundly influenced and, I argue, limited the critical part of the field. For example, it has led Hughes et al. (2020) to attempt to write about school leaders and leadership (in multi-academy trusts) while avoiding using those *verboden* ‘L-words’ in their title. Evans (2022b) writes of ‘wishing to bypass leadership’ (p. 427). For other leading critical researchers in the field of educational leadership, other foci and projects often take priority. For instance, Pat Thomson now focuses mostly on the creative arts, Helen Gunter writes more often on education policy, and Scott Eacott has turned his attention to education systems.

Speculation on those scholars’ motivations to focus elsewhere is unhelpful, but their actions nonetheless indicate a phenomenon within the field that enables the following arguments and observations. First, there is an unfortunate pessimism to arguments that a tainted concept can be addressed only through banishment or marginalisation; such a position constitutes a resigned acceptance of the discursive totalitarianism desired by authoritative voices and interpretations. Leadership is left to become wholly associated with only one set of (negative) discourses, and to contradict is to engage in ‘risky business’ (Blackmore, 1999), where ‘those who speak against the technicist discourses of effectiveness and efficiency are treated as if they were questioning holy writ’ (Ozga, 2000, p. 356). But why does