INTRODUCTION

Who is this book aimed at?

Teachers making the transition from the role of classroom practitioner to that of manager will find shelf upon shelf of books on management in any well-stocked bookshop. None of them will be on management in ELT, however, and it is precisely to fill this gap that this book has been written. Furthermore, because it deals with ELT, the book should be more relevant and more accessible than those management books which are based on manufacturing industry.

Aiming at newcomers to the field of management, at administrators and at those who are curious to know how a teaching organization might be run more effectively, we have set out to provide a clear, practical guide to the management of English language teaching schools both in the United Kingdom and elsewhere in the world. Taking many of our examples from good current practice drawn from our own experience in ELT institutions, we hope that the principles exemplified can, with adaptation and sensitivity, be transferred internationally.

We recognize that in a book of this size and scope, it is not possible to cover everything. For instance, we have not dealt with the management of co-operatives because very few schools are organized in this way and none of us has any direct experience of such organizations. Nor have we dealt with the question of cross-cultural and international differences in management styles because this is an area which requires considerably more attention than could be discussed within the confines of this book.

How should the book be used?

It is not intended that you should work through the book sequentially, starting at Chapter 1 and ending with the final chapter, although it can be read in this way. Rather, you may find it preferable to refer to chapters which are of immediate interest and relevance. Each chapter contains a set of follow-up activities which reinforce and develop the content of the chapter by relating it to practical issues. We do not anticipate, though, that you will work through all of the follow-up activities. Instead, a choice can be made from the activities available, ranging from practical exercises to small group discussions to simulations, all of which make it possible to use the book for individual

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self-study, for a programme of staff development involving a group of colleagues or as the basis of an ELT management course.

How is the book organized?

The book is in three parts, each focusing on a different management theme. Part One deals with people and organizations. Part Two is concerned with marketing. Part Three covers accounting and finance.

Part One

In Part One, the introductory chapter on organizations and the final two chapters on organizing resources and managing curriculum development and innovation were written by Ron White who, as Associate Director of the Centre for Applied Language Studies at the University of Reading, has confronted the practical problems associated with all of these areas, from which it has become clear that professional and pedagogical issues have management needs and consequences. In his chapter on organizations he emphasizes that organizations are primarily about people and that each organization has a cultural character of its own. The implementation of any kind of change in teaching objectives, content, methodology or assessment will involve not only matters of pedagogical principle; it will also involve people's views and values so that change is not only a question of introducing new technology, but of changing people's behaviour, and these are issues which are addressed in the chapter on managing innovation. The smooth running of an organization depends both on people and on the setting up and operating of routines and systems which promote efficiency, and his chapter on organizing resources and information looks at how this can be achieved.

The chapters on staff selection and development and communication are based on Mike Stimson's experience as Director of Studies at the Cultura Inglesa Sao Paulo and subsequently in the Personnel Management Department of the British Council. This practical on-the-job experience has been deepened by studying for a Personnel Management qualification with the Institute of Personnel Management.

In many ways, his chapters cover ground which you will probably be familiar with, having yourself experienced selection interviews, looked at advertisements, enjoyed (or suffered) training courses, and wondered how to cope with some of the conflicts that have arisen in the schools you have worked in. While this experience should be drawn upon to provide a frame of reference and a basis for the follow-up activities, there will be a need to make some order out of such disparate experience and it is the function of these chapters to give coherence to this aspect of management.

The first chapter deals with the process of selecting staff and all that this entails, while the next chapter moves on to consider training and career-

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planning in schools, with particular reference to performance appraisal. Inevitably, the problem of poor performance has to be faced in the issues of discipline and dismissal. Finally, the theme that underlies all three chapters – communication – is considered and he emphasizes the importance of nurturing all forms of communication so as to avoid grievances and conflict. The increasing need for negotiating skills, for both management and trade union representatives, is also covered in some depth.

Part Two

Mervyn Martin's chapters on marketing draw on his experience as Marketing Co-ordinator for the Bell Educational Trust, combined with the academic training acquired as part of his MBA. He begins by looking at marketing, which is not just another word for selling or advertising, but is a separate approach and a discipline in itself. Fundamentally, marketing in the ELT world is concerned with why customers should choose one school's services in preference to another's. All businesses – and schools are businesses – have to market themselves, and everything and everyone that has an impact on the client using the school is part of and falls within the ambit of marketing. What is important is how consciously and professionally they do so, which means that marketing needs to work to a strategic plan. These chapters deal with devising and operating such plans.

Part Three

All aspects of an organization's activities, whether recruiting staff or introducing new methods and equipment or finding out what the public wants, involve planning, and in his chapters on finance, Robert Hodge deals with what is, for many ELT specialists, the most esoteric aspect of management. With a career which has combined financial training and ELT, he relates the principles and practice of financial planning and control to the ELT context and shows why financial records are necessary and how they are organized.

So as to be able to use financial statements intelligently, it is vital to know where they come from and what they mean. Chapter 10 provides an introduction to double-entry book-keeping, which is the conventional way of recording and summarizing financial transactions in financial statements. Although most people will not have to do their own book-keeping, it is important to understand the principles involved. While the double-entry convention is excellent for recording transactions, it can be misleading when transactions are summarized in a profit and loss account and balance sheet. Chapter 10 tries to show why.

Chapter 11 concentrates on three areas that are of major importance to managers: planning, decision-making and cash flow. For each area, the chapter presents a way of looking at a business, and shows how managers can manipulate each component.

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Chapter 12 restores the human element by dealing with the kind of information a manager may be given or should obtain, and how it can be interpreted. Not least, it shows how information can affect behaviour, often in unpredictable or undesirable ways.

The area of accounting and finance involves practical activities. Although it involves numbers, it is not like the arithmetic we learned at school. It seldom offers 'right' answers or 'correct' methods. It is a response to practical problems and anyone can do it if they are prepared to experiment. However, it helps to have some instruction, if only to avoid puzzling over problems that others have faced and solved before.

Most accounting and finance textbooks are aimed at present and future specialists. Ours is aimed at readers with an interest in the general problems of management accounting, specifically in language schools. The approach taken in this book is, therefore, different from that of the conventional accounting and finance textbook. We assume that readers are interested in principles rather than the manipulation of numbers. This doesn't mean that the Chapters 10 to 12 are theoretical. All of the points are illustrated with examples, though where strictly life-like numbers (e.g. $8\frac{3}{4}\%$ of £157) would obscure principles, we have opted for simpler numbers (e.g. 10% of £100). This makes some of the examples slightly forced, but the pay-off should be a clearer focus on logic rather than on fine detail.

If you are employed in a school and have access to financial information (which is often confidential), you will have a wealth of data to work on, and the activities at the end of each chapter are intended to stimulate real and practical analysis. If you don't have access to detailed financial information, a number of activities with simulated financial information have been provided. As the subject essentially involves a way of looking at things, the activities include a number of general questions which are intended to stimulate a mind set. If you require more extensive practice in techniques, you can study the books referred to in the bibliography.

Finally, we have used conventional words like 'business' and 'profit' for convenience' sake. If you are involved in non-profit making or public sector organizations, you will be aware that their activities are businesslike, even if they do not in legal terms produce a 'profit'. You can substitute 'operating surplus' or a similar term instead without any change in the underlying meaning.

Whether we like it or not, all schools – including increasingly those which are part of the state-maintained sector – are businesses. Marketing aims to make the business grow profitably. Finance controls the running of the business. Personnel administers the business and looks after staff. Organization provides the structure. It is our hope that this book will provide a better understanding of all these aspects of ELT management.

There is, however, a word of caution. As we noted at the beginning of this introduction, a well-stocked bookshop will contain dozens or even hundreds of books on management. There is, however, no such thing as perfection in

management, in spite of what many of the more racey management titles may suggest. Like teachers, managers are constantly having to work at ways of improving what they and others do together. This book is a contribution to that improvement.

Ron White
Mervyn Martin
Mike Stimson
Robert Hodge

PART ONE: PEOPLE AND ORGANIZATIONS

1   ORGANIZATIONS

Aims

The aims of this chapter are:

1 to define some key management terms and concepts and provide a conceptual framework for ideas and procedures which will be presented in subsequent chapters.
2 to review the main characteristics of organizations.
3 to set up a scheme of organizational needs.
4 to categorize and describe organizational cultures and relate them to differences within and between organizations.
5 to identify elements of structure in a school organization.
6 to evaluate different approaches to organizational structure.
7 to consider management styles and functions.
8 to define the features of effective delegation of authority.
9 to outline a systematic approach to management as the basis for the effective management of a school.

1.1   Organizations

Schools are simultaneously two things: *institutions* and *organizations*. The school as *institution* will have a legal status, with governors or shareholders (depending on whether it is state or privately owned), a board of management, staff and students. As an institution, the school will have to conform to whatever legal requirements are laid down for such institutions, and it will normally be registered with the appropriate authority as an employer and tax payer. As an institution with a legal entity, the school assumes legally defined responsibilities, and it will be the school as institution which can be held accountable for fulfilling these obligations.

Schools are also *organizations*, which is to say, they consist of a network of relationships among the individuals who regard themselves as belonging to that organization. These relationships will be variously directed towards the achievement of the goals of the organization, towards maintaining the organization as a social unit, and towards fulfilling the personal needs of the individuals. Organizations have no existence other than through the people who make them up, even if, as we shall see, it is possible to describe the

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relationships among their members in terms of structures and functions. Without people, there is no organization – just as, without students, a school has no existence as a living and functioning organization, even if it may still have a legal existence as an institution.

Because all of us as individuals combine a mixture of the rational and irrational, so, too, organizations contain both rational and irrational elements. It is as well to bear this in mind, since neat descriptions of organizational structure can obscure the volatile and all too human aspects of organizations and, although we may talk of organizational goals, it is not the organization as such which has the goals, but the individuals within it. Given the fact that everyone is different, it is scarcely surprising that there will often be a diversity of goals among members of an organization, and one of the problems which management has to face is reconciling such differences and helping to establish a consensus as regards goals and the means of achieving them.

In addition to people, there is another vital aspect of an organization: its technology. Technology constitutes the means by which various operations are carried out in pursuit of organizational goals. It includes both *hardware* (things like computers, typewriters, reprographic equipment, video recorders) and *software* (printed material, video tapes, computer programs). An important part of organizational technology is the communication systems which enable information to be circulated around members of the organization (see Chapter 4). Another important part of the educational technology of a school is the curriculum itself (see Chapter 6), since it is the curriculum which embodies not only the pedagogical aims of the school, but the methods and materials employed in realizing those aims. In short, then, the technology of an organization consists of both tangible and intangible means whereby organizational goals can be achieved.

Finally, organizations, like any social unit, are characterized by belief and value systems which influence, sometimes very profoundly, the relationships, practices and achievements of the organization. That is, organizations have a *culture* by which they can be characterized. The culture of a school is expressed in the attitudes and behaviour of people towards each other, and it is something which we pick up from what people say and do. For instance, in one school all decisions about the choice of textbooks may be made by the academic director or Director of Studies without consultation with teachers. In such a school, the culture would tend to be based on the idea of a hierarchy of command and professional status. In another school, such decisions might be jointly arrived at through discussion involving all tutorial staff as well as feedback from students. Such a school would have a collegiate culture in which teachers are seen to have as equally valid a contribution to make as senior tutorial staff.

Other examples can be drawn from the kinds of routines and systems which staff and students are expected to conform to and from the relationship between staff and students. To take an instance, a school which values the

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student as an individual will tend to put a lot of emphasis on pastoral care, while one which sees students in less humanistic terms may keep them at arm's length and encourage distant and impersonal contacts between teachers and learners.
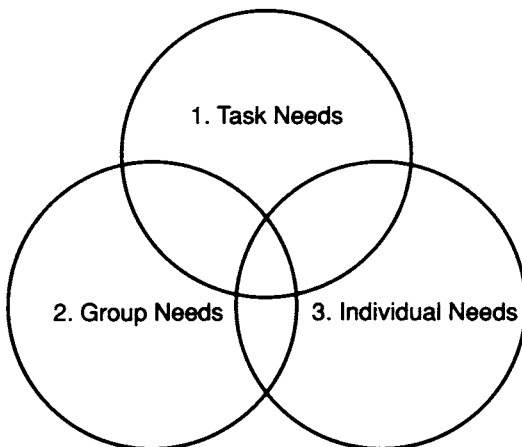
It is also not uncommon for different sections of an organization to have cultural differences. Typically, there will be a difference between the administrative and tutorial staff, the former tending to value set routines and ways of doing things, the latter often preferring variation and originality. One of the roles of management is to promote a satisfactory cultural mix so that the organization can both achieve existing goals and adapt to changing circumstances.

1.2   Needs and the organization

A school exists to provide an educational service to its clients (i.e. the students) and other stake holders (i.e. people having an interest in the school, such as parents, members of the community, employers, governors, shareholders). There is some ambiguity as to the status of the clients within any educational organization: are they raw materials in the process of being converted to finished products; are they co-participants with teachers in a process of discovery and growth; are they consumers of a service provided by the school; or are they something else? Different schools may give different answers to these questions, depending on their own goals and culture.

As an *organization*, a school will have to fulfil and maintain in balance three broad sets of needs, as depicted in Figure 1.1.

Figure 1.1 Organizational needs (from Adair 1983, BACIE 1978)

The *task* needs are those which have to be satisfied in order successfully to carry out the work of the organization. If, for instance, we take a private language school, one of its goals will be to stay in business and to generate a profit. To achieve this, students will have to be recruited, so marketing and selling the school's services will be a key task, which will involve planning a marketing strategy, allocating work to people assigned to marketing, and providing finance so that, for instance, publicity material can be prepared, printed and distributed while the person in charge of marketing can be enabled to make contact with potential clients and agents through visits abroad. Carrying out the work of marketing and selling will have to be monitored so that mailings are sent out on time, marketing tours are made at the best time to recruit students, and projected student numbers are realized. If for some reason, such as a postal strike which delays mailing, planned activities fall behind schedule, the plan will have to be adjusted and alternative procedures put into operation. For instance, a marketing tour might be brought forward so as to circumvent delays caused by a postal strike.

The second set of needs, those concerned with the *group*, are to do with the organization as a social unit. For the organization to meet task needs, successful group maintenance is vital, because, if it becomes split into antagonistic factions – as can happen given cultural differences between different parts of the organization – it will be swept off target. Satisfying group needs gives rise to such group functions as:

setting standards
maintaining discipline
building team spirit
encouraging, motivating and giving a sense of purpose
appointing sub-leaders
ensuring communication with the group
training members of the group

All social groups have standards of behaviour both for work and interpersonal relationships. Often these standards are unspoken and it is only when they are violated that people become aware of them. For instance, a school with a particularly dedicated staff may have very high expectations of staff as regards the amount of time they devote to out-of-class activities. Teachers who give less time to such activities will be seen to have infringed work standards and the group may then impose some sort of pressure – or discipline – on the teachers concerned to bring them into line with group norms in this aspect of their work.

The successful creation and maintenance of team spirit is also important and it is a mark of a successful organization that this social need is fulfilled. It is in an attempt to do so that people will engage in what may be seen as being purely social relationships. A happy and harmonious staff room is one sign that such group maintenance needs are being met, while such activities as meeting for a drink after work are further examples of the same thing.

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Finally, there is a third set of needs which have to be met – *individual* or *personal* needs. If they are not met, there will be a loss of morale and motivation among the individuals who make up the group or team. Meeting individual needs involves:

attending to personal problems
praising individuals
giving status
recognizing and using individual abilities
training the individual

Basically, all of us like to feel valued and a successful organization is one in which people feel that their worth as individuals has been given appropriate attention. Indeed, the kinds of individual treatment which good educational practice advocates for students apply equally well to teachers and other staff.

It can be helpful to match these individual needs against Maslow's hierarchy of needs (Maslow 1970). His theory of individual development and motivation was originally published in 1943, and he proposes that people are wanting beings. They always want more; but what they want depends on what they already have. He proposes that human needs are arranged in a series of levels, with physiological needs at the lowest level, and proceeding through security needs, affiliation needs and esteem needs, to the need for self-actualization at the highest level. This hierarchy is often depicted as a pyramid (Figure 1.2), with the highest needs at the top.

Figure 1.2 Maslow's hierarchy of needs
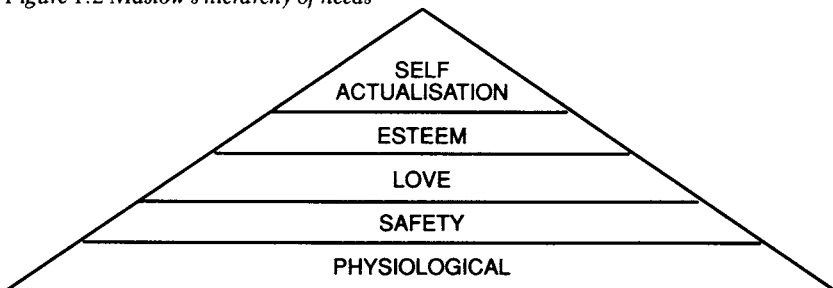
The principle behind this hierarchy is that, beginning at the lowest level, the needs of each level have to be satisfied to some extent before people think about needs at the next level above, and only unsatisfied needs motivate a person. Problems can arise in an organization if such needs are overlooked. Assuming that physiological and security needs are normally met, the social, esteem and self-realization needs may so motivate individuals within the organization that they may become more concerned with the fulfilling of individual or personal needs than with the realization of group and task needs. In other words, individuals may become concerned with 'me' rather than 'us' and it can be this which is at the heart of staff motivation problems.

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