

TITLE:

Performance Management as a Means of Teacher Evaluation: A South Australian Perspective

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ABSTRACT:

The introduction of performance management in South Australian public schools raises a number of issues regarding the structure, purpose and control of the process itself and the consequences of teacher evaluation. Performance management has the potential to shape teaching and the culture of schools according to what it values and what it ignores. In this article, some of these issues to ascertain the impact of this evaluation policy on South Australian public schools are examined.

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Dr Sham Naidu

The present history of teachers in much of the Western world has become one of decreased status and control with relation to educational issues, loss of autonomy, worsening of conditions, loss of purpose and direction, destruction of health, increased anxiety and depression, lowering of morale, and, despite a continued proliferation of policy rhetoric to the contrary, subjugation to increasing government and other external controls of schooling and curricula. The initiatives currently being imposed on teachers are serving, at one and the same time, to reduce the professional knowledge and critical scholarship which teachers bring to their work, and to decrease the political impact that teachers might bring to bear through their instructional activities. (Harris, 1994, p. 5)

Introduction

The introduction of performance management in South Australian public schools raises a number of issues regarding the structure, purpose and control of the process itself and the consequences of teacher evaluation. Performance management has the potential to shape teaching and the culture of schools according to what it values and what it ignores. In this article, some of these issues to ascertain the impact of this evaluation policy on South Australian public schools are examined.

Performance management as a means for reform

Coleman (1988) maintains that:

Throughout the world, governments are attempting to reform their education systems in the face of national and global change. In many advanced industrial societies, where both economic and natural resources are in decline, investing in human capital now constitutes a central platform of economic and education reform. (cited in Gleeson & Husbands, 2001, p. 1)

As a result, education has become increasingly preoccupied with performance: pupil performance, teacher performance and the performance of the school. In other words, what we are currently witnessing is a reorganisation of the teaching profession as it is

reconstructed around the notion of performance and the implications of a performance culture (Gleeson & Husbands, 2001).

This reorganisation has firmly entrenched the concepts of performance management and performance-related pay, not only in the private sector but also in the public sector. A report by Wood and Maguire (1993) indicates that performance pay systems now operate in the public sector in twelve Organisation for Economic Cooperation and Development countries including the United Kingdom, the United States, Canada and Australia, where the focus is on middle and senior level managers. Brown (1998) maintains that two major objectives appear to be driving performance management, namely, performance improvement—including enhanced efficiency and effectiveness in achieving specified outcomes; and performance assessment—including a greater level of accountability. With specific reference to Australia, Chadbourne and Ingvarson (1992) inform us that:

The education industry is being influenced increasingly by assumptions underlying corporate managerialism. For schools this means facing demands to become more results-oriented, setting performance indicators that are attached to objectives rather than strategies, adopting the culture of the private sector, and operating more like business enterprises where all 'investments' must realise a 'profit'. (p. 28)

An offspring of the above ideology has led to contemporary performance management models becoming an important component in the overseeing of employees in work. According to Sikes (2001, p. 87), most governments argue that performance management systems are necessary in order to raise the achievement level of students. To achieve this goal, teachers must engage in structured programs in which their work is monitored and evaluated annually. However, Sikes (2001, p. 87) refutes the government's argument by stating that performance management is a system in which 'teachers are marginalised, their professional knowledge and expertise is given little value . . . education is commodified, marketised, conceptualised as a product to be delivered to personnel, ie. teachers who must be managed'. Before I elaborate on this viewpoint, I would like to illustrate some of the value assumptions underpinning performance management and the serious implications they have for teachers.

How has performance management evolved?

Coates (2000, p. 1) states that ‘performance management belongs to the postmodern organisational notion of a “human centred” subjective management system, manifest in Human Resource Management, Strategic Manpower Planning and Total Quality Management’. For many, performance management is associated with piecework and performance-related pay. This has resulted in performance management being conceived as an evaluation principle having little or no effective objective (McArdle, 1992). According to Coates (2000, p. 1), ‘this fear has become a rational one in recent times for education through the articulating notions of surveillance and control’. Basically, there are two opposing views to performance management. On the one hand, we have those who support this method of teacher evaluation and, on the other, we have those who view performance management as a means of exercising greater control and increased levels of surveillance over teachers (Coates, 2000).

Coates (2000, p.1) also maintains that ‘performance management has its roots in the “classical theory of organisations” with strong notions of power and control through management’. In this instance, performance management is viewed as an effective tool to control workers and as a means to overcome potential problems likely to be caused by employees. Moreover, in the context of teachers’ work, the increasing use of performance management models and performance-related pay at all levels, illustrates the ‘increased emphasis in policy and practice on those elements of a school’s work which can be subjected to management and measurement’ (Gleeson & Husbands, 2001, p. 2).

Performance management prescribes a ‘required’ outcome in terms of productive increases in performance. However, teachers, as people, are only marginally associated with the process (Bartol & Martin, 1991). Thus, performance management, in the context of teachers’ work, ‘becomes a formal organisational mechanism for controlling the performance of work tasks on a rational, subjective, and continuous basis’ (Coates, 2000, p. 1) and is, according to Bevan and Thompson (1991):

- The yearly or half-yearly setting of individual performance targets relating to the operating units’ target within the overall organisation;
- A formal review of progress towards these targets, and/or the identification of training needs;

- The creation of a shared vision of the organisation's objectives, occasionally through a mission statement communicated to all employees. (cited in Coates, 2000, p. 2)

Arising from the above, it could be stated that performance management is primarily concerned with clarifying teachers' tasks, ensuring that set goals are met and that teachers achieve their stated outcomes in an environment characterised by increased levels of surveillance and accountability (Brown, 1998). Performance management thus shifts the focus away from any direct or technical forms of teacher evaluation 'towards a discretionary or self-management aspect' (Coates, 2000, p. 2). Teachers are now compelled to exercise discretion in their work as a result of technological changes impacting on their working environment. As a result of this discretionary behaviour, teachers now become prone to their own subordination. Foucault (1974) saw this as the development of a technology of power and domination. Knowledge, Foucault argued, always supports several truth claims that are an intrinsic part of the struggle for power within human groups. As performance management is a form of knowledge over individuals through appraisal files, it is also power over them. Central to Foucault's argument is the belief that knowledge reflects power and authority positions. It therefore embodies both meaning and social relationships. They 'are not about objects; they do not identify objects; they constitute them and in the practice of doing so conceal their own invention' (Foucault, 1974, p. 49).

For some principals and coordinators, performance management provides the opportunity to direct and control teachers' work where there are fewer physical performance outcomes. Moreover, more than thirty years ago, McGregor (1960, p. 75) argued that 'appraisal programs [we] re designed . . . to provide more systematic control of the behaviour of subordinates'. This viewpoint is supported by Menter, Muschamp, Nicholas, Ozga & Pollard (1997), who maintain that performance management is a classical example where 'managerialism exerts greater power and control over employees' [teachers'] lives' (cited in Down, Chadbourne & Hogan, 2000, p. 2).

From a managerialistic perspective, Rees (1995, p. 15) argues that in education 'managerialism is not divorced from social and economic policies nor is it a set of neutral and scientific techniques uncontaminated by politics and struggles for power'.

‘Performance management is but one part of the broader shift to the market model of education with emphasis on effective and efficient economic management of human and financial resources’ (Down, Chadbourne & Hogan, 2000, p. 2). Rees (1995) maintains that:

Management is deemed to be inherently good, managers are the heroes, managers should be given room and autonomy to manage, and other groups should accept authority. (p. 17)

In questioning the value of management, Rees (1995, pp. 17–18) explains that this ranges from the idea that ‘management is a tool box enabling people to make their way in the world’ to one where ‘public servants should be managers’, to the notion that ‘a public sector is not about the delivery of public services but about the management of scarce resources’. For Rees, management is ‘a technique . . . presented as a symbol of authority, order and control, the powerful means of improving the performance of anything that the energetic manager touches’ (1995, p. 17).

Arising from the above discussion, it could be argued that, in the context of teachers’ work, performance management evolved primarily with the intention of increasing the levels of teacher performance in order to make teachers more efficient and more effective in the ‘performative’ state. This raises the question, ‘what is performance management?’ The next section discusses the nature and definitions of performance management.

The nature and definitions of performance management

It is difficult to ascertain a clear definition of the term ‘performance management’. What most theorists have offered is a ‘description of the various elements which go to make up an overall account of the technology involved in operating a performance management model or regime’ (Mahony & Hextall, 2000, p. 69). Ironside and Seifert (1995) say:

unitarist management . . . treats neither the subject nor the process [of performance management] as problematic. All that is left, perhaps, therefore is to describe the functions and activities and skills and then provide some anecdotal examples. (cited in Mahony & Hextall, 2000, p. 69)

Murlis (1992, p. 65) maintains that the elements of performance management are solidly grounded in human resource management. She states that:

One of the major lessons emerging . . . is the need for effective performance management to underpin the pay system. A good working definition of performance management is that it is 'the process which links people and jobs to the strategy and objectives of the organisation'. Good performance management is about operating a process which increases the likelihood of achieving performance improvements. Current thinking in this area indicates that management needs to be practised by the integrated operation of four processes . . . planning for performance, managing performance, appraising performance and rewarding performance. (cited in Mahony & Hextall, 2000, p. 69)

In a similar vein, McLagan (1989, p. 53) states 'that the focus of performance management systems is on ensuring that individual and organisational goals are linked and that what individuals do everyday supports the organisational goals'. For Armstrong and Baron (1998), performance management is:

A strategy which relates to every activity of the organisation set in the context of its human resources policies, culture, style and communications system. The nature of the strategy depends on the organisational context and vary from organisation to organisation.

It was suggested that was described as a 'performance management system' compiled with the textbook definition when the following characteristics were met by the organisation:

- It communicates a vision of its objectives to all its employees;
- It sets departmental and individual performance targets that are related to wider objectives;
- It conducts a formal review of progress towards these targets;
- It uses the review process to identify training, development and reward outcomes;
- It evaluates the whole process in order to improve effectiveness.

In addition, 'performance management organisations':

- express performance targets in terms of measurable outputs, accountabilities and training/learning targets;
- use formal appraisal procedures as ways of communicating performance requirements that are set on a regular basis;
- link performance requirements to pay, especially for senior managers. (cited in Mahony & Hextall, 2000, p. 70)

According to Beer (1981, p. 25) and Saul (1992, pp. 27–28), performance management systems, in both the private and public sectors, typically have a broad range of objectives such as:

- developing individual job objectives which link with those of the organisation;
- improving individual and organisation performances;
- improving two-way communication between job holder and supervisor so that any confusions about job goals can be cleared up, ideas can be shared; things that affect the job holder can be discussed openly and any problems/difficulties dealt with;
- improving staff motivation and morale;
- developing job holders' knowledge and skills by providing training and personal and career development;
- realistically evaluating job holders' performance and providing accurate and constructive feedback on time; and
- providing a firm basis for validating and defending personnel management decisions.

As a result of increasing pressures for productivity, accountability, rationalised human resource allocation and equal employment opportunity compliance, Brinkerhoff and Kanter (1980, p. 3) predicted that 'there would be a growth in the use of formal systems of performance appraisal, modelled on private sector experience, in private, government and non profit organisations'. Thus, what becomes apparent from the above definitions is that 'Performance Management has different implications at a number of different levels: the personal, the institutional, the systematic and the societal' (Mahony & Hextall, 2000, p. 71).

The purpose of performance management—why have one?

Much has been written about the merits or otherwise of performance management systems. A number of recent articles question the purpose and usefulness of performance appraisals and assessments. Duke (1992, p. 4) suggests that the evaluation of school administrators is conducted for a variety of reasons. These

include selection and advancement, control, accountability, ensuring the achievement of organisational goals, and professional development. Many, such as Eunson (1994), Meyer (1991), and Wright (1995) suggest that the real purpose is not related to performance, but rather to increased managerial control or bringing about conformity. However, writers such as Cogdell (1998, p. 1) contend that we should be looking at a new approach that would 'embrace ideas like continuous learning, process improvement and team development, which are directed at the whole system, and the shaping of roles to get results'.

Whilst, Cogdell's contention might have some merit, I am more inclined to support Kenway, Bigum and Fitzclarence (1995) and Marginson's (1993) views of performance management. They maintain that performance management is but one part of the broader shift to the market model of education with its emphasis on effective and efficient economic management of human and financial resources. Also, to reiterate what Rees (1995, p. 15) had stated earlier in this chapter, 'the current obsession with managerialism in education cannot be divorced from broader social and economic policies nor can it be seen as a set of neutral or scientific practices somehow uncontaminated by power and ideology'.

Down, Chadbourne and Hogan (2000, p. 2) also maintain that 'as economic policies have changed to complement the competitive attributes of larger businesses, so the fascination with management has gained momentum'. As a result, managerial discourses have become firmly embedded in current educational practices. These discourses have been 'steered' through the simultaneous centralisation of content and direction, and the decentralisation and devolution of responsibility to individual schools, in what Clarke and Newman (1997) describe as the 'managerial state'. In this new environment, management (and its managerialist tendencies) is critical in ensuring that institutions perform effectively to standards required by government. Thus, managerialism has emerged in education, as with other public services, due to an increased concern with results, performance and outcomes. Referring specifically to recent educational changes in Britain, Forrester (2000) argues that these changes have resulted in greater control by central government. To elaborate:

Many of the initiatives that were introduced to establish the conditions for a competitive market in state education have led to a shift away from the Local Education Authorities, who had controlled much of the day-to-day

running of the system, towards central government on the one hand and individual schools on the other. Deregulation and centralisation thus occurred simultaneously, and worked together. (Forrester, 2000, p. 134)

However, Forrester (2000, p. 134) stresses that ‘while schools have been given freedom through the Local Management of Schools to manage their own affairs, the focus of control is now almost entirely with central government’.

Furthermore, Forrester (2000, p. 134) argues that assertive drives by New Labour to improve the quality of schools and of teachers by the use of performance indicators has in actual fact resulted in increased central control over pedagogies and teachers’ work in schools. For example, the government is primarily concerned with achieving predetermined targets in all schools under its control. As a result, schools are subject to processes of audit which are symbolic of a top-down approach to management in education. Within this context, it can be argued that performance management primarily serves to function as a regulatory mechanism.

Relevant concerns associated with performance management

According to Mahony and Hextall (2000, p. 73), ‘there are many different sources to which one could turn for analysis of performance management both as an ideology and as a set of working practices’. For the sake of clarity, I restrict my discussion to responses to this current practice as echoed by teachers, both in Britain and South Australia.

One of the major arguments presented by Mahony and Hextall (2000) pertains to the relationship between pay and performance as espoused in the *Green Paper* on performance management. They criticise the assumptions made in the *Green Paper* that financial rewards will motivate teachers and enable them to improve. They maintain that:

what motivates teachers is not simply money (though no-one has yet claimed that teachers could do with less of it). Even if individual self-interest were the overriding motivator (rather than a professional commitment to doing the best job possible), it has been pointed out that the proposals [performance-related pay] may turn out to be self-defeating in respect of the system as a whole. (p. 75)

A major concern with performance-related pay, they argue, is that it will result in ‘good educational practice or innovative teaching, far from becoming shared amongst a school staff . . . [and become] a personal commodity to be sold in the internal market of the school’ (2000, p. 75). Mahony and Hextall (2000) cite a teacher’s comment on this premise as follows:

I just think it is going to be incredibly diverse . . . people come into school and instead of sharing all your ideas and sharing everything that you do, I think it is just going to end up with people keeping everything for themselves and feeling, well if I’m going to get good results then I’m going to get it for me. (p. 75)

They also state that this teacher felt that:

The majority of teachers are not motivated in the ways presupposed by policy-makers . . . I mean how many teachers are going to sit there, gosh I’m super, I’m going to go for that? Most teachers are in it for the job. They are not there to blow their own trumpet. And I don’t know that those that should be recognised will ever get recognised. (p. 76)

Another important concern to emerge from their interviews was that most teachers considered the issue of performance-related pay as ‘insulting’. This is highlighted in the following interview conducted by Mahony and Hextall (2000):

TEACHER: I mean if OFSTED had been in and looked at you and whatever—I’ve been inspected three times now and always got high ratings. Why should I set myself up for going through another hoop? It’s just yet another hoop that you have to go through and you feel well, you know it’s insulting, why should I have to keep proving myself?

IH: Does this mean you won’t be applying to go through the performance threshold?

TEACHER: Absolutely not—just pay us a decent wage, we all work hard here. (p. 76)

In addition, the pressures caused by the performance management structure and the tensions between assessors and assessed were another area for concern. One of the teacher interviewees in Mahony and Hextall’s (2000) study summed up this situation by stating:

I think it [performance-related pay] makes a two-tier system. I think people who don’t move through the threshold are going to feel that they are being looked at and thought, why not, why haven’t you applied? Do

you think you wouldn't be able to achieve it? And so people who are in that position are going to feel like a second-class citizen. (p. 76)

Teachers in South Australia also expressed similar reservations of performance management. In the next section, I critique the prior performance management policy that was implemented in South Australia. This critique clearly illustrates that teachers were totally disillusioned with the policy imposed upon them.

A critique of prior performance management policy implemented in South Australian Schools

Spreadbury (2001, p. 8) states that 'in 1992, the then Education Department came under criticism for the release of its first attempt at addressing the performance of teachers in schools, the intentionally developmental but none too positively titled, *Managing poor performance* scheme'. Many teachers pointed out that the latter scheme was in itself an end point and lacked a context. They advocated a 'logically sequenced, continuous and positive framework within which teachers and leaders could engage in meaningful feedback which would enhance already effective teaching practice' (Spreadbury, 2001, p. 8). However, this was not to be.

In 1994 the newly created Department of Education and Children's Services initiated the first performance management policy for teachers which set out to determine a framework for enhancing every teacher's work. Cava (1997, p. 6) states that the Department of Education and Children's Services' policy was 'one of hierarchical (line management) supervision . . . in keeping with the corporate mentality . . . it attempted to reduce education to a mechanism needing to be correctly calibrated in order to perform specific tasks'. He further stated:

- Teaching was reduced to nothing more than the implementation of curriculum packages like the Statements and Profiles, meanwhile lip service was paid to the need of teachers;
- The Department of Education and Children's Services' performance policy assumed teacher performance could be easily measured, managed and made more accountable. The process was subjective, arbitrary, inconsistent and influenced by management agendas, passions and fixations;
- To Department of Education and Children's Services, performance management was about inspecting and evaluating the workers and not the

organisation. The major rationale for this system seemed to be accountability and efficiency;

- Current school culture in line with Department of Education and Children's Services' policy was being driven by the economic imperative. There was a push to define teachers as economic beings rather than social beings;
- The Department of Education and Children's Services' aim was to subordinate the classroom teacher to the superior wisdom of their line managers; and
- Teachers were seen as functionaries, employed to carry out the wishes of Department of Education and Children's Services and their principals', left many feeling alienated, mistrusted, harassed and undervalued. (Cava, 1997, p. 6)

Thus, it was not surprising that many progressive teachers viewed the Department of Education and Children's Services' performance management practices as a failure because they completely misjudged what motivated teachers. It failed to take cognisance of the fact that teachers' 'commitment is altruistic and is motivated from within, not inspired by indicators or manners' (Cava, 1997, p. 6). In addition, two relevant studies undertaken during this period echoed teacher criticisms of the Department of Education and Children's Services' policy. Grealy's (1997) research findings highlighted three major concerns evident in the policy:

- Firstly, the policy was very general and did not provide details of appraisal processes. This could have led to a variety of interpretations and a lack of constituency as schools developed their own processes. Further, the policy lacked any accompanying support or procedures;
- Secondly, the policy rested on the assumption that there was an agreement on what was good teaching and ignored issues of detail as to who would be appraised and by whom, the methods of appraisal, the frequency and outcomes; and
- Thirdly, the policy attempted to combine the formative or performance development process and the summative or performance management process into one teacher appraisal process. The policy did not explain how these processes could be linked together and a careful reading of the policy document revealed that the policy did not prescribe summative appraisal. (p. 7)

Brown's (1998) study highlights four major issues of contention by teachers with the performance management policy:

- Firstly, the above policy was seen as removed from the complex world of teaching;
- Secondly, the policy lacked a human side, particularly in terms of the importance of relationships in teaching and learning;
- Thirdly, the language used in the policy text was a third target of criticism. Many of the terms and phrases used were not seen to be educational ones;
- Finally, there were questions regarding who the policy was designed to benefit (pp. 23–24).

Furthermore, one principal interviewed by Brown (1998) echoed the following sentiments about the policy:

We don't use the term at this school. It seems to me a little bit like a factory worker . . . there are a whole lot of skills you learn by rote and the better you get at it, the better the product is. That's a bit limiting. (p. 15)

One of the problems is the terminology—it's a foul term, performance management. Performance conjures up things like, that teaching isn't a real thing and that as a teacher, you never show your real self. It's like you're playing this game the whole time and putting on this front . . . and at the end of the day, you can go home and become yourself again. (p. 15)

Brown (1998, p. 16) also stated that 'the most obvious theme to emerge from the principals' interviews was that performance management must be about learning rather than the control of teachers' work, and, in particular, that it must promote a strengthening of teachers' abilities to theorise their work and base changes to their practice on emerging insights'. One principal stated:

If you actually get out of the fog of Performance Management and just have conversations with teachers about their work, then what you're really going to find is that they, for the most part, know quite a bit about what they do, and for the most part, they want to know more about what they do. There's even a few out there who want to know why the hell they're doing it and those are the ones who really start to make things bounce. Now, is that Performance Management? According to the policy it's not. (p. 16)

Whereas the term Performance Management means someone is watching, someone is checking . . . we use the term 'learning' (and) you see a completely different approach by a teacher and there is a different atmosphere in dialogue between two people. (p. 16)

According to Brown (1998, p. 16), a glaring conclusion from the above two comments is that principals viewed 'teachers' learning as a paramount consideration in their conception of performance management. Rather than seeing teachers as workers needing to hone their technical skills, teachers in effect were being considered as intellectuals and their work a form of intellectual labor'. Brown (1998) summarises the viewpoints of the principals interviewed by stating:

The principals have clearly drawn their directions for practice from the belief that Performance Management is not about ensuring teachers reach an acceptable level of accountability for their work, but rather that teachers are engaged in a deeply intellectual endeavour which presents ethical and moral dilemmas about which numerous choices must be made. In order for Performance Management to be a meaningful process—part of the everyday milieu of teaching—teachers must belong to a climate where trust is high, risk taking is valued and relationships enable diversity to strengthen the collective view. (p. 22)

The teachers interviewed by Brown (1998) perceived performance management in the following manner as expressed by one of them:

I see performance as the clown juggling the balls . . . and you can perform in a classroom if you have to perform, like if someone is watching you. So I don't know that performance is necessarily the right word. (p. 23)

Another point made about performance management was that:

There are so many words that can be put in front of it - poor quality, outstanding . . . The problem with teaching is, who decides what is good performance and what is bad performance? . . . perhaps another term would be better because as soon as you bring in a term like performance, you bring in a threat. (p. 23)

Overall, the teachers interviewed by Brown (1998) saw the need:

- to steer the use of performance management away from an attempt to measure teachers' ability to reach particular standards of competence towards its use as a tool for more deeply understanding teaching as a form of intellectual, moral and political labour

- for performance management to be seen, not as an additional program or responsibility, but as a natural part of teachers' work with a strong focus on students and their learning
- for skill development to be a central tenet of performance management, particularly in terms of giving and receiving feedback, engaging in dialogue and asking questions that encourage forms of practical and critical reflection on practice
- for performance management to focus on the successful practices of teachers as well as points for change and growth
- for resources, especially time, to be allocated to support teachers' involvement in performance management. (p. 29)

Conclusion

Teachers are currently working in an environment described as the 'performative state'. This in turn has led to the creation of 'new technologies' to monitor and control teachers' work, namely performance management. Most state government educational departments, for example, South Australia, view the philosophical and political underpinnings of performance management as the most suited means that policy makers can evaluate teachers' work. However, as I have argued in this article, teachers clearly object to the efficacy of using this bureaucratic approach as an educational practice to evaluate their work.

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