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Uniwersytetu Jagiellońskiego

Contemporary Issues in European Educational Leadership

Eds. Roman Dorczak & Robin Precey

LEARNING

INDIVIDUAL HUMAN DEVELOPMENT

INCLUSION

COOPERATION

TRUST

RESPONSIBILITY

Contemporary Issues in European Educational Leadership

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CONTENT

Introduction

The book consists of chapters written by authors from different European countries mostly having both practical and research experience in educational leadership. They used a range of theoretical approaches and research methods to discuss issues important for future school management and leadership in changing and turbulent contexts of contemporary world. Following chapters deal with topics shortly described in this introduction:

Oğuzhan Bozoğlu and Bekir Yeşilyurt from Turkey look at the issue of Higher Education Institutions leadership arguing that more distributed model of leadership might be much better in HEI context.

Robert Dorczak from Poland in his chapter presents an analysis of the discourse around the reform of education in Poland of 2017. He explores the visions of education and understandings of the role of school expressed by different social actors, showing the peculiarities of the discourse of educational leaders. The presented analysis shows how the vision of education and understanding of the role of school differs in thinking of leaders, parents and policy makers.

Johan Sandén from Sweden in his part presents accounts regarding Digital School Administration (DSA) from Polish and Swedish principals. Author categorizes them in productive, destructive or irrelevant representations of impact on schools and tries to show key factors that make DSA work at school level in a productive, destructive or irrelevant way.

Noah Bar Gosen from Israel rises the issue of managerial aspect in the role of the homeroom educator in high schools in Israel. Research focuses on everyday practices of homeroom educators and subject teachers using such comparison to give some practical recommendations.

Bożena Freund from Poland assumes that taking into account development of students as key value of educational leadership requires various competencies that help to support such value. She focuses on role of health promotion and argues that this is still neglected issue in discussion on educational leadership development.

Emily Gould from United Kingdom in her chapter explores the most-able pupil's perceptions of their own wellbeing and the impact that the introduction of a wellbeing intervention can have on them.

Susan Allen, also from United Kingdom discusses the problem of transition between schools which is a problem for every school system in the world. In her texts she tries to give some recommendations for teachers and leaders who prepare and receive children in moving schools. **Lucy Green** from United Kingdom in her chapter seeks to establish how the motivations of those involved in the delivery of careers education influence it. She especially underlines the importance of taking into account student voice in developing careers education strategy in schools.

Lindsay Thom, next author from United Kingdom investigates the perceived effects of school leadership on pupil behaviour in a Swedish state middle school that teach mostly in English. Her conclusions stress importance of trust and good communication as key factors in implementing change within schools.

Brooke Chandler from United Kingdom presents the research that looks at impact of an intervention programme that implemented transformative leadership approach has on improvement of test results in some English schools.

Finally, **Robin Precey and Anselm Fisher** from United Kingdom provide a critical analysis of the transformative leadership actions taken by the leaders of a federation of primary schools in a deprived area of London, during the Covid-19 pandemic of 2020. Their text is an attempt to introduce the issue of 'Covid-19' into discussion on necessary developments in educational leadership, which may be of interest in every European educational system.

Such mixture of topics and approaches gives a chance that every potential reader may find this book inspiring for both practical or research reasons. With such hope editors present this book to potential readers.

HIGHER EDUCATION LEADERSHIP AT STAKE: TOWARDS A MORE DISTRIBUTED UNDERSTANDING OF LEADERSHIP WITHIN THE CONTEXT OF RECENT TRENDS IN TERTIARY EDUCATION

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Abstract

This theoretical paper explores how higher educational institutional field has been going through a major change due to neoliberal policies, which in fact led to a chaotic, challenging and highly competitive environment where universities seek legitimacy. The massive waves of commercialization and massification as well as increasing competition and demand for more accountability reflect upon higher education governance and leadership. Following a discussion of these trends in HE context in Turkey, we suggest that the heroic understanding of leadership falls short of keeping up with the expectations. Therefore, a more distributed form of leadership might be more appropriate to function effectively in HE institutional field. In that sense, the article provides useful insights for practitioners in HEIs, especially those in governance positions, into the new face of higher education and how they can employ a more distributed leadership approach.

Keywords: higher education, distributed leadership, tertiary education

BACKGROUND

It is evident that globalization, with its economic, cultural and political dimensions, has become an indispensable part of our lives from business and art to everyday routines of ordinary man (Martens, Caselli, De Lombaerde, Figge & Scholte, 2015), especially following the collapse of Communist Bloc and emergence of digital technologies (Odin & Manicas, 2004). Higher Education is perhaps one of the areas that is influenced most by globalization, the reflections of which can be seen in different forms such as a shift to neoliberal policies and new public management approach in organizations. Today, every state sees higher education as central to gaining competitive advantage in international market and interferes with the management of higher education (Enders, 2004; Salter & Tapper, 2013), which was traditionally supposed to have a taken-for-granted autonomy. Higher education, when taken in the broader context, has undergone a dramatic institutional change (Vaira, 2004), in which the old, traditional understanding is being challenged by a dominant, strong wave of New Public Management. The power of market, involvement of various stakeholders in higher education policies, the increasing interest of society in the performance of universities, and the value-for-money directed research demands put enormous pressure on universities and challenge many aspects of it, from management to delivery of classes.

From a Neo-institutional viewpoint, which focuses on the interaction between the organization and its environment rather than the details of organizational behavior and internal dynamics (Cai, 2010), each organization is situated in an institutional field, where concerns about legitimacy outweigh more technical aspects such as efficiency (DiMaggio & Powell, 1983; Meyer & Rowan, 1977; Mizruchi & Fein, 1999). According to Neo-institutionalist scholars, gaining legitimacy in the institutional field is the primary mission of the organization (Boxenbaum & Jonsson, 2017; DiMaggio & Powell, 1983). Seeking for legitimacy, each organization tries to adapt to the institutional field, which eventually leads them to resemble each other. DiMaggio and Powel (1983) asserts that acting according to rationalized myths of other organizations and society about what makes an organization a legitimate one, organizations are subject to three different isomorphic pressures: coercive, normative and mimetic. While coercive pressures refer to pressures from society, regulatory bodies, state and other organizations on which a particular organization is dependent in terms of resources, normative isomorphism is more related to professional aspects. Finally mimetic pressures mostly emerge in times of uncertainty, when organizations imitate other organizations that are believed to be more successful, more powerful and more legitimate.

A thorough understanding of higher education institutional field is crucial to gain insight into how higher education management and leadership is changing and challenged by the trends in the institutional field. Adoption of private sector practices, stress on accountability, introduction of quality assurance mechanisms as instruments of steering by the state are all reflective of a paradigm shift in higher education context. In this very context, one can easily witness how the wider institutional field can affect individual organizations, namely universities.

The purpose of this article is to provide readers with a general picture of higher education institutional context in Turkey and question the changing roles of HE administrators. The article particularly focuses on the potential effects of trends in HE sector in Turkey, the isomorphic pressures that university administration has to deal with, and the changing definition of leadership in HEIs. Considering a massive paradigm shift has already redefined HE leadership, we suggest that a more distributed leadership approach can help HE administrators deal with the pressure more effectively. Therefore, the paper first presents an overview of the changing HE institutional field based on some global trends and provides information about the situation in Turkey. Then a discussion follows whether a more distributed understanding of leadership can yield more positive outcomes regarding HE governance in Turkey.

THE HE INSTITUTIONAL FIELD: NEW TRENDS

PRIVATIZATION AND COMMERCIALIZATION

Before Neoliberalism became the hegemonic paradigm and practices of New Public Management were widely adopted, the most frequently resorted form of higher education was public universities, both in Turkey and worldwide (Levy, 2014). However, for the last few decades, there has been considerable growth in private higher education (Altbach, 1999; Azra, 2008; Levy, 2014). It now accounts for 33.3 percent of the world's overall higher education sector (Levy, 2014). This percentage being much smaller in Turkey (7.9 percent); it has doubled within the last decade and seems to be climbing up. Between 1963 and 1972, Turkey had witnessed flourishing of private universities which, however, were terminated due to political instability and following military coup. Yet, the global trend of private higher education has been evident in Turkey for a few decades, most of which happened in the last decade. The government shows its willingness to encourage the establishment of more private universities in various parts of the country. The most recent data reveals that there are 77 private HEIs in Turkey right now, five of which are

non-profit, compared to 129 public universities (the increase in the number of public universities from 2017 to 2018 can be partially explained by the state law passed recently. The law made it necessary for some large-scale universities to split, leading to the establishment of new public universities.)

However, the only form of privatization is not the establishment of new private universities; it is also visible as the partial privatization of public universities in their financial resources and management (Levy, 2014). Outsourcing, partnerships, leasing and commercialization of once-public services can be the means of public universities' privatization (Mok, 2005). Fees, fund-raising, contract research, and private sector partnerships are the most striking versions of private interference in public universities (Klofsten, Jones-Evans & Schärberg, 1999; Louis, Blumenthal, Gluck & Stoto, 1989; Philpott, Dooley, O'Reilly & Lupton, 2011). In Turkey, most public universities try to sell their services, the examples of which include alternative certification programs, distance education, summer schools, contracted research and technology transfer.

The commercialization of public universities matters a lot considering the pressure on university management to be able to compete against these new players, namely private universities as well as other public universities. Taking innovation as the main motivation (Brécard, Fougeyrollas, Le Mouel, Lemiale & Zagamé, 2006), more interaction among industry, university and state has become a reality in HE sector (Etzkowitz & Leydesdorff, 2000) and this has changed the traditional role of university -production and dissemination of knowledge- and forced them to be more entrepreneurial (Grimaldi, Kenney, Siegel & Wright, 2011; Guerrero & Urbano, 2012). Such concepts as Academic Capitalism and Entrepreneur University has become common denominators for the contemporary universities. The rise of commercialization has profound effects on universities from decision-making and research orientation to teaching. When it comes to HE administration, the leaders, who are basically academics, needs to negotiate demands from many different interest groups, deal with hegemonic isomorphic pressures and may even act as CEOs pushing others to deal with more-profit oriented research and focusing on networks to be legitimate and preferable in the sector. This new aspect of HE leadership not only contradicts the traditional notion but also brings about many challenges to educational leadership. For example, university administrators might abandon the pursuit of effective teaching, student empowerment and basic research for the sake of curiosity-driven, profit-oriented research and may have to force the academics to comply with the new profit-seeking activities.

Entrepreneurship can come in different forms in HEIs, from soft ones such as publishing of research outcomes to harder types of it such as patenting, licensure,

start-ups and techno parks (Philpott et al., 2011). How it is interpreted by the organization may eventually reflect upon organizational activities. It is undeniable that there are both coercive and mimetic pressures on university management to be more profit-oriented, and it also defines the profession of academics, which, in turn, lead to normative pressures. Even if HE leaders resist such isomorphic pressure to some extent, they eventually need to compromise, and compromising itself redefines what leadership is.

MASSIFICATION

The higher education system has been witnessing a huge wave of massification all over the world (Hornsby & Osman, 2014; Mok & Neubauer, 2016; Shin & Harman, 2009). Many advanced economies have gone through this surge almost simultaneously; in mid-1960s, early 1980s and mid-1990s. According to World Bank Statistics (2017), the total enrollment in tertiary education in 2017 is 36.7%, compared to 29.3% in 2010, 19% in 2000 and 10% in 1970. This number is much higher than Trow's (1974) bench mark of 15 percent for the elite-mass distinction; which puts forward that any product that is accessible by a population of more than 15 percent is regarded as a mass produce, rather than exclusive (Trow, 1974). The transition of higher education from an elitist view into a public good can be explained by various reasons. The individual expectations and community realization of the importance of higher education in economic development and competition, the emergence of human capital approach, the boom of population in post-war era, increasing number of students in graduate schools can be counted as the major ones (Bloom, Canning & Chan, 2006; Prudence & Li-Tien, 2012; Rust, 1991). With the conviction that increasing enrollment in higher education improves competitiveness and welfare of the society, governments are devising policies to include more.

Massification around the globe has also brought about new difficulties to the governance of higher education. The quality of teaching and research, seeking for funds to keep up with the trend, equity issues, catering to a more heterogeneous student profile are the major issues that HE leaders has to deal with. Especially HEIs in developing countries like Turkey are under constant pressure by the industry and state to raise more capable students despite shrinking budgets. Satisfying the industry and the state demands in such a chaotic environment, maintaining their competitive positions add to the burden on HE leaders' existing ones. Taking into account the fact that a growing number of private universities may act more independently and proactively to make use of market niche, it seems that public

universities may face more challenges in the face of regulatory bodies which often tighten their flexibility.

COMPETITION

Higher education in many countries also suffer from an elevated competition owing to the state endeavor for a more dominant position in economy. Political and economic factors being the most obvious, competition is also linked to sociological self-image (Shahjahan & Morgan, 2016). Countries' emphasis on self-confidence may have a dramatic effect in their higher education policies. Universities are now adopting private-sector marketing and advertising practices to attract best-achieving students, try to climb up in national and international rankings, compete for reputation and act according to the parameters imposed by rankings. No matter how simplistic they can be, international rankings contribute further to the competition among universities because the simplest way to improve their ranking is the enhancement of university resources, academic staff, research and facilities (Marconi & Ritzen, 2015). Rankings have become so influential that now many universities use global rankings to determine their strategic planning (Hou, Morse & Chiang, 2012). The global tendencies are also apparent in Turkish HE. The ever-growing interest of the society and the state in rankings are evident in many Turkish HEIs' missions, visions and policies. Gaining top positions in well-known international rankings such as QS Ranking and becoming a world-class university has become the main motivation for a number of universities, both public and private, in Turkey.

For HE leaders, the ever growing competition means another aspect of leadership, which requires a comprehensive analysis of the institutional field. In addition to assumed traditional roles, competition eventually leads HE leaders, who are actually members of academic community, to adopt market-driven behaviors. Considering that most have no or limited experience in such matters, one can easily understand how challenging it is to balance the demands of a deep-rooted, traditional, organic public institution and isomorphic pressure from a market-driven desires.

ACCOUNTABILITY

In line with the emergence of rankings, quality assurance mechanisms and other trends discussed previously, a major direction in HE is a growing demand for more accountability. What makes being accountable particularly difficult for HEIs is the involvement of more than one powerful stakeholders in HE (Speziale, 2012). In HE setting, the pressure for accountability comes from three forces: government

authority, professional authority and market (Clark, 1986), which are actually deeply connected to the three isomorphic pressures discussed earlier. The contemporary understanding of accountability comes in many different forms, the most popular ones being licensing, audits, and accreditation and funding allocation mechanisms; and focuses on production of results rather than compliance with rules. The emergence of state-initiated or supported quality assurance and accreditation agencies as well as indirect accountability measures such as rankings underlies the traditional notion of autonomy. These external accountability mechanisms may be resisted by the organization, fall short of providing envisioned outcomes or conflict with the existing internal structures. However, it is evident that this is a powerful new mechanism being shaped by interrelated global trends including changing state-university relationships, emphasis on efficiency and value for money, internationalization, privatization and massification of higher education. Turkey has also adopted many of the global accountability mechanisms. The emergence of various national rankings each of which having different indicators, the licensing of accreditation agencies in different disciplines from engineering to teaching, the establishment of a national quality assurance agency directed by Council of Higher Education are some of the visible ones. Even if some universities may be reluctant or hesitant to comply with such demands right now, they will eventually compromise and adapt to the national and international trends.

The changing definition of accountability and autonomy shows itself as another challenge for HE leaders. Emphasis on being accountable and also legitimate makes HE leaders' job harder considering the sources of accountability. To whom the university will be held accountable is a hard question. However, a harder one is related to the extent. HE leaders, in this regard, must understand the pressure, satisfy the demands from different stakeholders and also translate these hegemonic trends in a way that will also not spoil the internal dynamics of the organization. What makes it particularly difficult for HE leaders in Turkey is that the HE governance is a highly centralized one which allows for only limited flexibility in employing individual organizational strategies.

A BRIEF OVERVIEW OF THE HIGHER EDUCATION IN TURKEY

Higher Education in Turkey includes all colleges, universities and higher education vocational schools. Besides these, military and police colleges and art schools are also a part of higher education. Currently, there are more than seven million students enrolled in tertiary education, with the highest number in bachelor

degree programs. Despite the growing enrollment rates, this is still below the OECD average, yet the demand for tertiary education will escalate the numbers in the coming years.

The administrative structure of universities in Turkey has been historically a centralized one though there were times when universities enjoyed short-term autonomy. For example, in 1946, a bill granted more academic autonomy to universities, yet it was only until the military coup of 1980, following it, a new constitution was validated in 1981 stripping universities of their full autonomy and institutionalizing government involvement in universities with a new institution- Turkish Higher Education Council (YOK) (Turkish Constitution Legislation Number 2547). From then on, YOK became the central decision-making organ regulating all structural and curricular decisions in Turkish Higher Education Institutions. However, it is also noteworthy to state that the new president of YOK has repeatedly said that he would like to give more autonomy to universities though no dramatic change has been observed so far with the exception of a few minor issues. Currently, Turkish higher education is structured as a quite centralized and controlled phenomenon as the ultimate puissance over it is YOK itself, which is also an institution without complete autonomy.

TOWARDS A MORE DISTRIBUTED UNDERSTANDING OF LEADERSHIP

From the discussion above, HEIs are under constant pressure from various mechanisms and the contemporary notion of a legitimate university necessitates a revisiting of HE leadership. The additional roles and responsibilities make HE leadership particularly a challenging one when one considers the chaotic nature of the job. In highly-centralized governance structure of Turkey, HE leaders try to assume their traditional academic roles, enhance student experience, seek for financial sources and maintain competitive advantage. It is clear that there are now so many aspects of HE leadership. In this regard, we propose that a heroic, one-do-all-the-work notion of leadership is not a sensible one considering all the expectations from HEIs. Therefore, we visited a contemporary concept of leadership, distributed leadership, and focus on the applicability of it in Turkish HE field.

DISTRIBUTED LEADERSHIP

First of all, a distributed notion of leadership sees leadership as a process rather than a personal trait (Gronn, 2000, 2002; Harris, 2004). In this process, members within an organization perform leadership tasks and responsibilities based on close

interaction within the organization and its environment. Regarding the abandonment of 'top-down' approaches in school governance recently, this democratic and participatory model of leadership extends the definition of leadership beyond a single authority to include widespread contributions from members and stakeholders (Spillane, Halverson & Diamond, 2004). What makes distributed leadership particularly important is that it considers the sociocultural context as an integral dimension of leadership practice. Another important proposition is that the nature of the task, organizational structure and routines are also taken into account in the leadership process. In doing so, it challenges the simplistic accounts of leadership and takes into account a broader perspective including personal, structural, social, contextual and developmental dimensions (Bolden, Petrov & Gosling, 2008). Distributed leadership includes multiple actors by making it certain that it exists in relationships, recognizes informal, spontaneous and collective behaviors in addition to formal, predefined authority by focusing on a horizontal notion of leadership rather than the traditionally acknowledged vertical, top-down approaches.

One important suggestion in the literature is that higher education leadership is a contested practice as it is closely related to interdependent, various institutional logics (Sewerin & Holmberg, 2017). Therefore, it is crucial to have a shared understanding of these logics so that collaboration and sense making can be established. Organizational context are characterized by multiple institutional logics and this, in turn, shapes the understanding of distributed leadership and how it is applied.

When it comes to 'how' to apply distributed leadership in organizations, it seems that the concept is still its infancy and more empirical studies are needed in different organizational settings. It is also noteworthy to state that the definition of distributed leadership is still an evolving one. Therefore, it is quite a dynamic one both in its consideration of the organizational context and its changing meaning. For example, there is some criticism against the concept of distributed leadership as it sometimes downplays and neglects the role of competition and micro politics inside the organization (Bolden, 2011).

In HE context in general and specifically in Turkey, three isomorphic pressures that continuously force universities to adapt to institutional field and gain legitimacy impose a multilayered sets of tasks. HEIs are under constant pressure to be more similar to what is 'a legitimate university'. However, the success seems to be dependent on team work which can enable a more participatory and negotiated understanding of legitimacy. Formal HE leaders, in this regard, can employ a more distributed leadership aspect in order to both create a common institutional logic and successfully manage isomorphic pressures.

One thing that the formal leaders can do is to show more willingness to distribute leadership. Whether it is in the form of project groups, spontaneous or well-defined teams or investing in long-term leadership empowerment, formal leaders' showing willingness plays a crucial role. In such a chaotic HE field, change becomes central to gaining legitimacy. Top-down, hierarchical practices of leadership may not provide a fertile environment to include members of the organization, and even lead to a strong organizational resistance that can hamper efforts.

Distributed leadership can also be practiced with the existence of both formal leaders and informal leadership teams. In highly-centralized HE governance structure of Turkey, it seems reasonable to adopt a hybrid leadership perspective in which formal authorities of leadership can co-exist with informal leadership practices. Such a shared governance structure allows for multiple benefits from increased transparency to greater participation in decision-making (Menon, 2005).

HEIs are now struggling with the tension between collegial notion of leadership and management principles adopted from private sector. In a highly competitive environment where HEIs need to respond to changes in the organizational field, leadership empowerment may play a crucial role. Allowing for more participation, distributed leadership practices may be quite useful in that those who have expertise can become a part of decision making process, thus making it easy to effectively deal with pressures. Instead of the expectation that one single person has all the relevant information and make the right decisions, a team-based, shared leadership which is based on expertise, knowledge and skills of the entire workforce may help HEIs gain competitive advantage (Van Ameijde, Nelson, Billsberry & Van Meurs, 2009).

RECOMMENDATIONS FOR PRACTITIONERS AND FUTURE RESEARCH

Based on the discussion above, we outline some specific recommendations for practitioners in HE area. First of all, a hybrid leadership approach may be more applicable in Turkish HE context. Much as it is a highly-centralized one, The Higher Education Council (YOK) may show more willingness to share its authority with individual universities. In the universities, the rectors and deans of faculties may encourage team-work in department levels. However, we believe that leadership distribution is especially important in areas that are relatively new in HE such as technology transfer, quality assurance and business-partnerships. In such areas, project teams may play a crucial role in complying with the pressure and help the organization devise successful strategies. Secondly, leadership empowerment is an equally important issue in HEIs. The notion of leadership is changing in HE and investing in human capital sounds optimistic considering the future demands by

the state and the market. Instead of expecting the rector to have expertise in many different areas such administration, marketing and branding, it seems more reasonable to benefit from the expertise and skills of those in the organizations.

Future research is needed both to develop a more comprehensive concept of distributed leadership and its applicability in different HEIs. Therefore, case study and action research may provide valuable insights into the 'how' of distributed leadership in different organizational settings.

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HOW EDUCATIONAL LEADERS SEE THE ROLE OF SCHOOL AFTER THE REFORM OF EDUCATION IN POLAND OF 2017? – CRITICAL DISCOURSE ANALYSIS

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Abstract

This paper presents an analysis of the discourse of educational leaders around the reform of education in Poland of 2017 in comparison to the discourse of other participants of the public debate, namely of the authorities and of the parent activists. It explores the visions of education and understandings of the role of school expressed by different social actors, showing the peculiarities of the discourse of educational leaders. It also presents the interests of different stakeholders represented in the discourse around the reform. The presented analysis shows how the vision of education and understanding of the role of school of educational leaders differs from those of the authorities and of the parents.

Keywords: educational leadership, reform of education, discourse, CAD

INTRODUCTION

In 2017, the Polish education system underwent the biggest reform in 20 years, which changed almost everything, from the schooling system and network of school to the curricula of all subjects. The reform was widely criticised by many environments, including political opposition, parent activists' groups, academia, school heads' organizations and teachers' trade unions. Since the first announcements of the plan to implement the reform, the government was trying to convince

the public opinion that the reform was necessary and well-planned, while the critics accused it of being chaotic, hasty, gratuitous and harmful for students.

In this paper, we would like to present an analysis of the discourse created around the reform by educational leaders, in comparison with the discourse of other social actors who took part in the debate, namely the authorities and parent activists. The analysis was conducted with the use of Critical Discourse Analysis which allows to examine ideological bias underpinning the texts and utterances in question, discursive manipulations and groups of interest whose presence in the discourse is implicit. In the first part, a few concepts from research on sociology of education and educational leadership are discussed to add some context to the analysis. In the second part, the research method is presents, including some key assumptions of Critical Discourse Analysis as well as research questions examined in the presented analysis. The third part is devoted to the analysis itself, followed by the conclusions from the research.

1. EDUCATIONAL LEADERSHIP IN TIMES OF REFORM

The concept of educational leadership is developed by many scholars and practitioners in opposition to mere management and administration of schools [see e.g.: Bottery, 2006; Dorczak 2014; Mazurkiewicz & Łuczyński, 2014]. Educational leaders are those who have a vision of the school's goals, a long-term strategy, know how to make others follow them and how to adapt their organizations to changes [Dorczak, 2014]. They are the ones who know how to react to the challenges of modernity and the ones whom contemporary schools need to survive and develop in an often hostile and demanding environment.

The role of educational leaders is essential in times of reform, when the future ahead of schools is uncertain, their knowledge and skills may help find the new ways and adapt to the new conditions. It may even be claimed that their direct involvement is indispensable if the reforms of education are to succeed. Robert Putnam, the author of the concept of social capital, puts forth that a high level of social capital in school heads, who are naturally predestined to the role of educational leaders, next to teachers and parents, is the necessary condition for the success of any educational reform [Putnam, 2008:499].

Mike Bottery [Bottery, 2016], who conducted research among school heads from England and Hong Kong, points out that educational leaders throughout the world face similar difficulties and reforms imposed by the governments are one of those. It seems true also in the contemporary Polish context, as school heads are those who are responsible for the efficient implementation of the educational reform

introduced in 2017 by the government of *Prawo i Sprawiedliwość* (the ruling right-wing party). The responsibility is indeed enormous, as not only did they have to adapt their schools to the new system of 8-grade primary school and 4-grade high school (instead of the previous 6-3-3 system) but also have to respond to the needs of other stakeholders who expected them to secure their interests throughout the process of the reform, in particular of the parents and students. They are usually at the front line, held responsible for any problems occurring along the way, and have to balance between the directives of the authorities and demands of the local community, trying to satisfy both.

One of the most significant challenges that the contemporary school faces is the appropriation of the field of education by the economy, especially by the neo-liberal dogma that has accepted by many governments around the world in the past few decades. Its implications for education and the threat that the school will become just a service provider instead of a public good have been noticed both by Polish and foreign scholars [see: Bauman, 2007, pp. 183–187]. Maria Mendel, a Polish researcher, puts forth a thesis that it may even mean the end of school as we know it, as subjecting it to the principles of economy contradicts its very essence as an institution whose aim is to give every member of the society a good education and a chance to move upwards the social hierarchy, regardless of their economic and social status. However, she also notices that good school leadership may help the school survive and sustain its public character in spite of the pressure from the external environment [Mendel, 2018, pp. 5–7].

Therefore, it is of utmost importance whether school heads notice these challenges and whether they bear in mind a vision of school as a public good. It is also important that they voice the interests of students from various backgrounds, as their voices are often silent in the debate about education. A good educational leader should also be responsive to the needs of the whole community and make the school its centre. Discourse analysis may allow to demonstrate whether these ideals are present in the thinking of Polish school heads. Juxtaposing their discourse with the discourse of the authorities and parents will also show whether there are any differences in the visions of school presented by different social actors in the public debate around the reform of education.

2. RESEARCH METHOD – CRITICAL DISCOURSE ANALYSIS

Critical Discourse Analysis tries to combine linguistics with social sciences, by analysing social processes through the lens of the language used by social actors. Its main assumption is that linguistic acts, both texts and utterances, are representations

of a given social structure. Their analysis may allow a researcher to undercover hidden relations of power, manipulations and interests in a discourse that may seem transparent to a regular observer. It also allows a researcher to take a position on the matter in question and, by exposing manipulative discursive practices, to contribute to a more inclusive and transparent public debate.

One of the first scholars to develop this method of discourse analysis was Norman Fairclough, a British linguist, who published his work on discourse analysis *Language and Power* in 1989, and initiated a school of CAD named British, among three others, namely Dutch, Austrian and German. The definition of discourse proposed by Fairclough [Fairclough, Wodak, 2006, p. 1047] frames discourse as a social practice and puts emphasis on its dialectic character. This means that any discursive event has an impact on the social situations, institutions and structures but is also influenced by them. Discourse is the not only an act of speech or writing but a structure represented in these. Discourse analysis therefore cannot be detached from the linguistic surface but goes far beyond to explore the structures and processes beneath it. A similar definition was proposed by Ruth Wodak, an Austrian scholar and founder of the Austrian school of CAD, who added the category of context to Fairclough's definition, suggesting that social, political, economic and historic context is indispensable in analysing particular discursive practices [Kopytowska, Kumięga, 2017, p. 183].

Fairclough's works on discourse analysis are important from the point of view of this paper also because he analysed the discourse on education in Great Britain in the 1980s. He explored the shift in discourse about public institutions and its appropriation by the logic of economy. A growing commercialization of public services was accompanied by a discourse presenting them as service providers that should first of all be rentable and bring tangible advantages both to individuals and to the society. In terms of education, it meant that schools should increase individuals' chances in the labour market and create growth of the national economy [Fairclough, Wodak, 2006, p. 1048]. He came up with the category of 'nodal discourses,' or discourses that combine the characteristics of two distinct discourses and have a power of materializing this combination [Warzecha, 2014, p. 185]. In that respect, it would be educational and economic discourses combined creating a reality where schools become service providers just as any other commercial entity on the market. It seems an important observation from the point of view if our analysis, as we have pointed out that commercialization of schools and the neo-liberal discourse's domination in the field of education are some of the most important threats to school in the modern era.

The analysis presented in this paper is part of a broader study on discourse around the reform of education of 2017. Its goal was to present the perspectives

and discourses of different groups of social actors, namely the authorities, school heads and teachers, and parents. The analysis material comprised both official documents created by different environments and comments in the media, such as parts of interviews given to the press. The authorities' discourse was analysed in the Act of 14 December of 2016 – Educational Law, which introduced the reform, and in the Regulation of the Minister of National Education of 14 February of 2017, which introduced the changes in curricula along with the reform, as well as in selected official communiques given to the press and parts of interviews published in the period after the announcement of the reform plans. The school heads' and teachers' discourse was analysed in official statements of the OSKKO – National Polish Association of Management Professionals in Education, and of the ZNP – The Trade Union of Polish Teachers, as well as in selected interviews given by members of these two organizations. The parents' discourse was analysed in the official statements of two organizations created by activists with aim of stopping the reform: *NIE dla chaosu w szkole* (NO for chaos in school) and *Rodzice Przeciwko Reformie Edukacji* (Parents Againts the Reform of Education), and, as previously, in selected interviews given to the press by their members.

The research's aim was to present the visions of education and the interests of social groups expressed in the discourses of these three sides of the public debate. As mentioned above, the ideal discourse about education would express a vision of it as a social and public good, serving the sustainable development of the society and of individuals, regardless of their socio-economic background, ethnic origins, religion, gender, sexual orientation and other characteristics. It should also express the interests of students, who are often silence in the debate and deprived of the power to decide in the matters that may have a tremendous impact on their future lives. Therefore, we looked for examples of such discourse in the analysed materials as well as for examples of discourse that would contradict these ideals and present another vision of education or represent interests of other groups. In particular, we looked for discourses that would be underpinned by ideology, be it neo-liberal or nationalist, which frame education as a mean of social engineering or as a service for the economy. Such discourses would express not only the interests of students but also of symbolic elites or of the classes dominating in economic terms and are undesirable in the debate about education from the perspective of the author of this paper, as they contribute to the threats for education as a public good discussed above.

In this paper, we would like to present the findings from the research with particular emphasis on the discourse created by educational leaders, that is of school heads working actively in the OSKKO association and participating in the public debate on the reform of education. The aim of the analysis is to present the vision

of education and interests of particular social groups expressed in the discourse of educational leaders in comparison to other social actors active in the debate. The research question is whether educational leaders recognize the threats discussed above and oppose the neo-liberal, or nodal, discourse that frames education as a commercial service, or whether they are part of it. It could be assumed that, as they are the closest ones to the educational processes along with the teachers, they would express the interests of students and of the entire local communities in their discourse, so we verified the presence of such a discourse in their statements as well, in comparison to the discourse of other groups.

3. ANALYSIS OF THE DISCOURSE OF EDUCATIONAL LEADERS

First, we will present the general conclusions from the research described above and discuss the visions of education and interests of social groups expressed in discourses of the three groups of social actors in question. Then, we will discuss the particular characteristics of the discourse created by educational leaders in comparison to other social actors and prove whether they recognize well and react to the threats to education discussed above, and whether their discourse shows the presence of the desired model of educational leadership in Poland, focused on sustainable development of the whole society and on the role of education as a public good.

In the discourse created by the authorities, we have identified many statements indicating the ideological character of their vision of education next to the vision of school as a public good. The authorities both in legal act and in their comments given to the media put emphasis on the role of school in educating values such as patriotism, national pride and the like. This indicates that the reform of education implemented by the government is underpinned with nationalist ideology and the aim of the authorities is not to create an inclusive school, sensitive to diversity. Here are some examples of such statements:

> *Zadaniem szkoły jest* ***wzmacnianie poczucia tożsamości narodowej, przywiązania do historii i tradycji narodowych****, przygotowanie i zachęcanie do podejmowania działań na rzecz środowiska szkolnego i lokalnego, w tym do angażowania się w wolontariat.*
>
> *The role of school is to strengthen the sense of national identity, affiliation to history and national traditions, to prepare and encourage to undertake action for the school and local environment, including involvement in volunteering. [Regulation 2017 – all quotes translated by the author]*

Podczas przedmiotu historia w naturalny sposób ***kształtowane są takie wartości jak: ojczyzna, naród, państwo, symbole narodowe i państwowe, patriotyzm, pamięć historyczna, prawda, sprawiedliwość, dobro, piękno, wolność, solidarność, odpowiedzialność, odwaga, krytycyzm, tolerancja, tożsamość, kultura.***

During the subject History, the following values are naturally formed: homeland, nation, state, national and state symbols, patriotism, historical memory, truth, justice, goodness, beauty, freedom, solidarity, responsibility, courage, criticism, tolerance, identity, culture. [Regulation 2017]

Treści geograficzne stwarzają doskonałą okazję do ***prowadzenia edukacji patriotycznej****.*

Geographical contents create a perfect occasion for conducting patriotic education. [Regulation 2017]

Another category of statements found in the authorities' discourse are those expressing the neo-liberal vision of education which should serve the economy. The authorities claim that many elements of the reform were created in cooperation with producers and entrepreneurs. According to them, school should prepare students to choose professional roles from the very early stages of education and educate for the sake of the economic growth of the country. Here are some examples of such statements:

We want to stimulate schools to open and conduct profiles, for which there is demand on the labour market. [Anna Zalewska, the Minister of Education, in an interview for Gazeta Prawna]

At the same time, we are working on a project of a regulation on vocational pre orientation already at the stage of nursery school, vocational orientation in grades I to VI and vocational counselling in the VII and VIII grades. [the same source]

We want the school to be quite flexible, to be able to earn its own money, so that a student can learn there how to act in a real company, workplace. [the same source]

There are also some fragments of the authorities' discourse that express the vision of education as a public good but the two threads mentioned above seem to be dominant. It is also worth noting that the discourse of the authorities is manipulative and their aim is not to create a space for a public debate but to impose the implemented solutions. The authorities claim that the reform was widely accepted

by many groups and is a response to the needs of the society identified in social studies. They often use data to back their statements but these data are interpreted in a way that suits the authorities' line. All this shows that the authorities express the interests of political and symbolic elites and not of students or of the society and their aim is to convince the public opinion to the reform and not to take part in a real debate. Here are some examples of such statements:

> *The changes in education that are being prepared are a response to the expectation of a broad environment that wants a modern school, but at the same time one that is strongly rooted in our tradition. ['Good School' – informational brochure issued by the Ministry]*
>
> *'We have hard data for the first quarter of 2018. In the economy it [the average monthly salary] is slightly over 4400 zł and in education it is 4600 zł,' she [Anna Zalewska] said, adding that she understands that teachers are upset, 'as they don't see this sum on their accounts,' However, she explained that the average is 'counted in a specific way.' [Anna Zalewska in an interview for Gazeta Prawna]*

In turn, the discourse of the school heads and teachers is very critical towards the reform. However, school heads and teacher criticise mostly the substantive aspects of the reform, pointing out that they may disorganize the work of schools and have a negative impact on the education of students. We have not identified any statements expressing an ideological vision of education in the discourse of school heads and teachers. According to them, school should be a public good and should give everybody equal chances to get a good education. Here are some examples of such statements:

> *Almost two decades of work for introducing Polish education and Polish students, graduates into the 21st century and a huge human capital, built on common work, trust to the state, may be lost. [from OSKKO's statement on the reform]*
>
> *Closing down middle schools and their teacher teams, who have elaborated their own innovative methods and projects of work with students in their adolescent years is an irreparable loss for the whole education. [the same source]*
>
> *Pre-school education is a foundation for further education of children. It is an essential mistake to plan education of school-like nature in nursery school, where we need child's development in the social and emotional spheres and providing equal chances. [the same source]*

In their discourse, the teachers often express their own interests and point out that the reform may have a huge impact on their employment. They also express the interests of students as they are the ones who are the closest to them during educational process in classrooms. School heads try to conciliate the interests of various stakeholders, including students, local communities, teachers and others. They also display readiness for dialogue with the authorities and point at some aspects of the reform that are good and may be a basis for further cooperation. Here are some examples of such statements:

> *'We ask the ministry to listen to our opinion, and our opinion – I think that it is the opinion of everybody here – is the following: take up a partner-like, serious dialogue with the socjety at last.' [Ewa Halska, OSKKO's president, quoted by the portal wPolityce.pl]*
>
> *You want to give us 7th and 8th grades, where we have 6- and 7-year-old children. 13- and 15-year-old children will come there, children at a very specific age. What are we supposed to tell our children and their parents, what good will this change bring them? [Izabela Leśniewska, OSKKO's member, quoted by the portal wPolityce.pl]*
>
> *We are fighting for education and for the prestige of our profession and these are principal values for every society. [open letter of ZNP – Polish Teachers' Trade Union]*

The discourse of the parents does not express a nationalistic or neo-liberal vision of education either. We have identified many statements where they claim that school should be inclusive, provide good education to everyone, regardless of their socio-economic status. They are often concerned that the reform would create school that would be oppressive for students from minority backgrounds. They also believe that school should help overcome social inequalities and not reproduce them. Here are some examples of such statements:

> *Closing down middle schools will make educational differences between the city and the country bigger. [postulates of the movement 'Parents Against the Reform of Education']*
>
> *Moving away from the educational obligation for 5-year-olds will make educational differences bigger between children from small villages and children living in cities, from homes with rich cultural background, and children from families who need support. [the same source]*
>
> *The new school moves away also from anti-discriminatory education – now, when almost every day we hear of race-motivated attacks. [Dorota Loboda,*

member of the movement 'Parents Against the Reform of Education' in an interview for Wysokie Obcasy]

The parents express the most the interests of their children, that is of students, whose voice is often not heard in the debate about education, and whom the reform concerns the most. The parents who were involved in organizations criticizing the reform usually came from middle-class backgrounds, were educated and had high cultural and social capital but they were concerned about the education of children coming from various backgrounds, also of those who did not have the resources to voice their own interests. Here are some examples of such statements:

I wanted to say publically and clearly that we, the parents, do not agree to see our children treated this way, to see them as victims of unjustified rush and chaos. [Dorota Łoboda in an interview for Wysokie Obcasy]

This reform is a huge project that loses children form its sight. [the same source]

We have also said that this reform concerns our children, no one takes them into consideration in this debate. [Dorota Łoboda quoted by WP]

The discourse of educational leaders presents a few characteristics in comparison to the discourse of other analysed social groups. First, their vision of school is not ideological, they do not endorse education that serves nationalistic values or neo-liberal economy, which could be clearly observed in the discourse of the authorities. The school that they want is inclusive, gives every student equal chances to get a good education and serves the society as a public good. Such a vision of the role of school is desirable and it shows that educational leaders recognize the threat of commercialization or ideologization of school and are prepared to oppose it. This confirms the findings of other studies presented in the previous part of the paper that educational leaders are those who have the knowledge and abilities to save school understood as a public good even in a hostile environment.

Second, school heads try to conciliate different points of view and interests in their discourse. They express very strongly the interests of students and show their concern that the reform may bring chaos to schools and be harmful for children. However, they try to take into account also the interests of other stakeholders, they are aware of the possible consequences of the reform for teachers or for local communities. They are also open to dialogue with the government, they notice the good elements of the reform and suggest solutions to improve those elements that they

find disadvantageous. Educational leaders are aware of their position in the middle, between the authorities, whose directives they have to implement, and their teachers, students and local communities, whose needs they have to address.

CONCLUSIONS

The presented discourse analysis demonstrates that a critical analysis of the discourse created by different social actors around the reform of education of 2017 in Poland allows to look into the visions of education and of the role of school in a modern society expressed in official documents and statements produced by different participants of the public debate. The analysed passages from the discourse of educational leaders show that their understanding of the role of education and openness to dialogue with all stakeholders stand out, particularly in comparison to the discourse of the authorities. Educational leaders understand that school should be a public good, should give everybody equal chances to get a good education and should not be ideological. They are also aware that school exists in certain circumstances and try to conciliate the interests of different groups of stakeholders. All this shows that Polish school heads are real educational leaders who may help Polish school go through the reform and maintain its democratic and inclusive character in spite of the threats of commercialization or ideologization. Further research and analysis of the discourse of educational leaders would be recommended to generalize and confirm these conclusions.

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DIGITAL SCHOOL ADMINISTRATION (DSA): PRODUCTIVE, DESTRUCTIVE OR IRRELEVANT?

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Abstract

This article presents accounts regarding Digital School Administration (DSA) from Polish and Swedish principals and analyse them from a conceptual and a contextual perspective. The accounts were categorized in productive, destructive or irrelevant representations of impact on schools, and first analysed using concepts from a Human Service Organization (HSO) perspective; professional capital, entrepreneurial role and decoupling. From this first analysis, a counter-intuitive rather than straightforward pattern between the principals' native view and the conceptual view is made visible. The second round of analysis was based on the context of the principals, comparing features of the Polish and Swedish school systems, and relating these features to the results of previous analysis. The article concludes that school system marketization and whether principals teach themselves are key factors for if DSA works productive, destructive or irrelevant for schools.

Keywords: school management and leadership, school administration, digital administration

INTRODUCTION

In school digitalization research, several studies have addressed implementation of digital tools (Blau & Shamir-Inbal 2017; Olofsson et al. 2011; Flanagan & Jacobsen 2003; Schiller, 2003; Ploom & Haldma, 2013) and how collaboration around

digitalization efforts can be made more efficient (Hauge & Norenes, 2015; Rott & Marouane, 2018; Collinson & Cook, 2004). The effects of digitalization on teaching and learning per se is a major topic in educational research (see for example Aili & Nilsson, 2018) while other types of studies have focused on for example consequences of digitalization for students that are socio-economically disadvantaged (Anthony & Padmanabhan, 2010) and social media activity of school leaders (Cho & Jimerson, 2017). One rare study concern how leadership capabilities are affected by digitalization (Altinay Aksal, 2015), while there is not much knowledge about the impact of digitalization on schools or principals administrative practices (Pettersson, 2018; Babaheidari & Svensson, 2014).

Public sector digitalization has by some been described as a fragmented research field. The field has covered topics such as macro-level changes, opportunities for making public organizations more efficient, changing the content of public services, implementation of systems and regarding citizen access to E-services (Meijer & Bekkers, 2015). How digitalization affects contemporary public human service organizations is seldom highlighted (Howcroft 2009, Rogge et al., 2017). However, one stream of digital government research focus on influence by digitalization on public sector practices (Gil-Garcia et al., 2018). This article aims to contribute to this emerging stream by addressing the lack of micro-level studies of digitalization effects and analyse how Digital School Administration (DSA) is experienced by principals. Understanding the consequences of DSA for human service organizations (Hasenfeld, 2009; Brodkin, 2010) can contribute to refining knowledge about effects of digitalization of public services.

The daily administrative work of principals is increasingly digitalized in schools all over Europe. Learning Management Systems (LMS) and Management Information Systems (MIS) are increasingly spread, implemented, used and sometimes integrated with each other. The aggregation of data from such systems is on macro-level called Learning Analytics and is encouraged by international educational organizations. The purpose of this article is followingly to contribute to our understanding of the effects of digital school administration and thereby also to the understanding of digitalization in public sector human service organizations. The research question is: *How does digitalization of administrative practices affect schools?*

The presented analysis is mainly illustrated with material from study visits made during 2017 at ten schools in Poland and Sweden. Principals were interviewed at all schools. The principals are educated teachers and has worked as such, but at the time they were interviewed they all worked as principals. Previous research, government reports and documents from OECD and the World Bank are also used for describing the contextual setting and principals work.

This article first describes and compares the setting in which the study was performed by defining DSA, comparing the context of the studied schools (the Polish and Swedish school systems) and the principals' role in this context. Second, it is presented how principals experience the digitalization of their administrative work and its consequences. An analysis is made using the concepts of professional capital, entrepreneurial logic and decoupling as tools. Third, a comparative analysis of Polish and Swedish principals, relating their experiences to context, is made. Fourth and finally, conclusions are drawn and a broader discussion of the implications of this study is presented.

THE STUDY: SETTING AND METHODS

DIGITAL SCHOOL ADMINISTRATION (DSA)

Many organizations of today use management information systems (MIS). The demand for performance information and the digitalization of management and work are in contrast to private sector and businesses, quite new in schools. There were debates in Sweden during the 1980s on work environment consequences of computerization of work, mainly driven by trade unions – but since then, computerization seems to have become an increasingly uncontested means for making work more efficient. Currently, the megatrend of Big Data is manifested as "Learning analytics" (Swedish national agency for education 2016) in the educational sphere. At the local level, this means in practice that monitoring and analysis is supposed to be automatically integrated into the school's digital infrastructure.

The studied Polish schools use two types of main computer programs for school administration. One MIS and one Learning Management System (LMS) which mainly concern pedagogical administration. Information about performance, finances, staff and the school building are the central content of the MIS, and some of the MIS allows for real-time monitoring. The LMS focus on the pedagogical work and communication among school staff, students and parents, however, the two types of systems are increasingly integrated since administrative and pedagogical work are intertwined. The LMS contains information about student performance, courses, timetable, communication with parents and students, attendance, hand-in assignments and similar activities. In addition, other software is used for other purposes. There are separate programs for student recruitment, specific education material, fiscal management and school library. On top of that, the programs used by the public agencies for compiling information, monitoring, budgeting and

creating comparable performance metrics, are used at the schools. The schools report information into several public computer programs and databases.

The Swedish schools also have extensive software portfolios. The schools often have one MIS (Stratsys is an often-used programme) but regarding LMS, the same school can have several parallel programs. They are sometimes contracted with Google, Microsoft or smaller national or regional software corporations (for example IST) but also use other LMS: s simultaneously. Besides MIS and LMS, it seems common for Swedish schools to have additional software for registering attendance, registering grades, recruiting teachers, reporting incidents and performing employee surveys. These schools also seem to use various software which are sometimes integrated with each other, sometimes not. The presence of DSA in Polish and Swedish schools is notable but and plays out in quite similar ways, which motivates a comparative study.

Features that are common in software descriptions are systematization and standardization which program providers argue leads to increased efficiency, better control and enhanced quality. Several companies also offer courses for schools in making themselves more auditable. Audit demand, rules and regulations are often used as selling arguments for why schools should purchase such training. In addition, there is an industry based on quality assurance (ISO, Qualis, etc.) that is linked to computer programs as part of what is called quality work (Player Koro et al 2018, Player Koro & Beach, 2014). DSA in Polish and Swedish schools is quite similar, which motivates a comparative approach since contextual differences can be highlighted.

POLISH EDUCATION

The Polish education system of 2017[1] is a product of extensive reform in 1991, 1999 and 2009. Independent schools were introduced in 1991 and supervision was separated from schools. There were also extensive changes to the curricula, removing the communist heritage. The reform put the current structure in place, with a clear division of public administration responsibilities, transparency and decentralization (Michalak, 2011). Jakubowski (2009) evaluated the decentralization reform as having had little or no impact on school quality. The system does however remain quite centralized.

The reforms conducted in 1999 represented a major shift to a "modern education system" that contained, among other features mandatory schooling up to age 18 and

[1] The Polish school system was heavily reformed regarding several aspects such as school structure, vocational training and curricula in 2017. This happened after the interviews were conducted.

stronger individual rights (Salitra, 2003). The school supervision system was largely reformed in 2009. Inspection is now conducted by regional government bodies of supervision which are responsible for controlling rule-following and quality evaluation of schools. They normally have delegation offices to particular areas or cities in the region. The reform added focus on quality rather than only rule-following (Mazurkiewicz & Walczak, 2012). It has been described as enhancing democracy, transparency and teamwork in schools. But also triggered and driven a change towards more performance measurement and the necessary information systems to collect, aggregate and analyse the information (Mazurkiewicz et al., 2014). The 2009 reform can be said to mark a shift towards performance-based inspection instead of legal inspection only.

The ministry of education is the centre regarding the organization of education since it is responsible for funding and regulation of schools. The ministry allocates funds to local authorities from the state budget. The funding is calculated through a sophisticated algorithm covering many variables weighted differently in the equation. Teacher's merits, property aspects, number of students are all examples of factors considered in this process, but student performances on tests or grades are not used for this purpose (Polish Ministry of Education[2] 2017). The ministry has an extensive database that keeps track of every single individual in the school system and the variables that are used to calculate funding. The database is frequently used by schools and is called SIO[3]. When funding is decided, funds are transferred to the district government who can also add additional funds to schools if they want and can afford it. The ministry is also responsible for rules regarding admission processes, timetables for mandatory subjects at each school level, curricula, archiving of documentation, rules for field trips and more. The World Bank describes the Polish educational system as a successful example of reform (World Bank, 2010) and Jakubowski (2015) evaluated the reforms as successful. Polish students score well in international measurements as PISA (OECD) and Poland has therefore advanced in international ranking tables.

SWEDISH EDUCATION

Swedish schools were in the 1980s criticized for being inefficient, bureaucratic procedures, lacking individual rights and teachers having too much power (like many other public-sector spheres during this period). The Swedish educational system has been under heavy reform since the 1990s. Blomgren and Waks (2017) show

[2] Ministerstwo Edukacji Narodowej.

[3] Educational Information System [Systemu Informacji Oświatowej], https://sio.men.gov.pl/sio/login

70 reforms from 1990 to 2013, and the educational sphere has been described as a crowded policy space (Börjesson et al., 2017).

Schools were decentralized to local government level in 1991 (Blomgren & Waks 2017). One of the more comprehensive official governmental reports in the education area aimed at evaluating the impact of the decentralization reform (SOU 2014:5). The report concluded that decentralization had negative impact on pupils' study results[4]. Teachers without proper education and reduced monitoring was seen as the cause of the drop in study results (SOU 2014:5). The report claims that the local government lacked competence to manage schools and prioritized financial or other short-term profits while other necessary measures such as monitoring, evaluation, teacher training and recruiting competent teachers was given little attention (SOU 2014:5). In 1992, a voucher-system was introduced (Gov. bill. 1991/92:95) and the number of independent schools, many run by for profit companies has since then increased.

At least thirteen changes of major significance were made in the education act during 2010 – 2014 (Swedish school law 2010, p. 800). These involved teacher-certification, career-paths, changed grade scale, changed regulation for documentation and changed timetables. (Gov bills 2009/10:219, 2010/11:20, 2012/13:64, 2012/13:136, 2012/13:195). In addition to the changes in the education act, the regulation that govern schools and teachers have also changed in soft regulations, instructions by agencies and guidelines. The overall development of the education sector can be described as having moved from active centralized control during the 1980s via a decentralized performance management to reactive centralized control during the 2000s and 2010s (Montin, 2015). What currently characterize the Swedish education system is the quasi-market organization, which is unique in international comparison (Berg, 2007; Wikström, 2006; Lundahl, 2002; Börjesson et al., 2017).

PRINCIPAL WORK

With regards to the reforms in Sweden, Swedish principals seem to experience quite some external pressure on their work, relating to a diverse set of challenges derived from marketization, organizational logic, bureaucratic aspects, democratic values and professional judgement (Jacobsson & Svensson 2017; Hult et al., 2016;

[4] The reform was though not motivated by study results, and some other the stated objectives was successfully achieved. Increased citizen participation, opportunities for local adaptation and the safeguarding of individual students' rights are examples of fulfilled goals.

Lindgren et al., 2016; Persson et al., 2005). The roles of principals in Poland and Sweden are however in practice both quite administrative oriented. Swedish principals do no teaching and are not required to be educated teachers. Polish principals are required to hold an approved qualification in educational management (OECD, 2015) and normally do some teaching, around six hours per week seems common. Besides their own teaching, Polish principals have several responsibilities such as staff administration, pedagogical supervision, fiscal responsibility, responsibility for pupils physical and psychological development, marketing, organization and implementation of tests and other externally oriented work (like meeting with parents and organizations) (Michalak, 2011; Interview C), which is similar to what Swedish principals do (Brüde Sundin, 2009).

OECD (2015) highlights the professional discretion at local government and school level in Polish educational policy, but also downplays the discretion over resource allocation. A simultaneous process is that Polish principals seem increasingly influenced by managerialist trends (Michalak, 2011).

Principals at most schools, both in Poland and Sweden seem to have financial administrative duties. In one Polish municipality, the financial discretion of the principal is low: First, the schools' finances are monitored, and reporting is done every 10 days. Second, the budget is very detailed and specific. The principal can for instance "not buy a desk with money that is supposed to be used for chairs" (Interview C). On another school, the principal receives pots of money that can be spent within larger categories, for instance "property and facilities", or "pedagogical support" (Interview P). Fiscal management is not the central task, or issue, that comes up when talking to Swedish principals. They rather focus on administrative work in relation to quality reports and external monitoring.

Principals in both countries spend time meeting with external actors, both organizations and parents. However, parents' pressure to get information about the school, their children's performance and the teaching quality is low in the Polish schools (Interviews Polish schools). Swedish principals think parents influence and pressure has become such a large issue that it risks the work environment of teachers and displace pedagogical work (Interviews Swedish schools). Some of the principals consider themselves as gate-keepers between parents and teachers to allow teachers to focus on their pedagogical duties.

Staff administration is quite different between Polish schools and Swedish schools. One Polish principal says she is in court at least two times every month regarding employment matters for individual teachers. She is also responsible for teachers' professional performance (but lacks power to hire teachers, which is done by the local government) (Interview C). None of the interviewed Swedish

principals describes such formal or legalist procedures. On the other hand, there are Polish schools where this formal relation doesn't apply at all. At an independent school in Warsaw, the issue of salary increase is described as "When we think it's time, we just say, Hey, there hasn't been a salary increase for two years, and the principal normally say, okay, I'll see what I can do" (Interview R), which illustrates the informal relationship between principals and teachers.

Both Poland and Sweden have what OECD would call a modern, performance-oriented education system. While polish system is centrally funded, Swedish schools are funded by local government. Decentralization has had negligible effect in Poland while it is seen as a major cause of falling student results in Sweden. Polish students perform very well in international comparison. The polish system has been through three large reforms while the Swedish system has been reformed 70 times (but the scope of reform has varied a lot) in the last 30 years. Polish principals teach but Swedish principals normally don't. Swedish principals may followingly be closer to the entrepreneurial role, while Polish principals may relate more to the expert-oriented role. There is also a difference in the pressure experienced. While Polish principals are pressured mainly through fiscal aspects (and followingly by local government), Swedish principals are more pressured regarding legitimacy through representation of quality indicators, performance measures and proper documentation. This pressure comes followingly not only from local government, but also from parents and the market. To sum up Polish and Swedish school systems are similar in several ways and principals do very similar work, but some differences is highlighted in the table below.

Table 1. Overview of contextual comparison

Characteristic	Poland	Sweden
System	Modern, centrally funded, performance oriented with institutionalized supervision	Modern, locally funded, performance oriented with institutionalized supervision, quasi-market
Student results	International role model	Decreasing in international comparison
Reform	3 large reforms	About 70 reforms in 30 years
Principal teaching?	Yes (more professionalized)	No (more entrepreneurial)
Pressure	Money	Legitimacy

Source: own work

The similarities regarding DSA are striking in the two educational systems, which motivates a comparison. The educational systems and the nature of principal work are similar in some ways, but interesting differences are highlighted in the above table, that makes it possible to generate ideas regarding the influence of these differences when school administration is digitalized.

MATERIAL AND ANALYTICAL APPROACH

The aim of this paper is addressed through analysing ten Swedish and Polish schools with material mainly generated from study visits at the schools. Principals were interviewed on all study visits. The visits included guided tours around the schools as well as chats with students and complementary informal interviews with teachers. The visits lasted between 3–7 hours. This material is complemented with documents and findings from previous research.

The schools were invited to take part in this study by e-mail and regular mail to the principals. The principals that were interviewed were all educated teachers and had worked as such, but now work as managers at schools. The interviews were in Sweden performed solely by the author face-to-face while, two additional interviewers assisted the author in Poland for documentation and translation. The principals in Poland had teachers joining the interview for adding information and helping with translation. All study visits took place between 2016-11-28 and 2017-04-24. The interviews with principals followed a semi-structured format, where the interviewees were free to reflect on the topics of DSA focusing on their own work. One important notion related to the interviews is that the respondents were not explicitly asked what they think of their professional capital or discretion, but rather in what ways DSA matter for them in performing their work, to emphasize an empirically founded conceptual analysis. This focus on work and practice builds on findings from previous research. Fournier (1999) has shown how a rhetoric of professionalism in practice can serve an organizational logic since values such as transparency, individual rights and democratic aspects are all part of both the organizational logic and professional capital (Sachs, 2001, p. 157; Ball, 2003, p. 221; Green, 2011). Since the professional capital and organizational logic, and the entrepreneurial and expert roles, can be rhetorically intertwined, it was important to focus the interviews on work duties rather than abstractions. The resulting material contained great variation, which was central for making interesting patterns visible.

The first analytical step was to identify empirical themes. Three categories of principals' experiences were identified from the material and explicit statements was then sorted into these three categories; productive, destructive or irrelevant views on

the impact of DSA on their schools' discretion. In the second step of the analysis, the empirical categories were linked to the conceptual categories of professional capital, entrepreneurial logic or decoupled from discretion, performing a more conceptually informed implicit analysis, overwriting their native view (Svensson, 2014). The third and final step of the analysis was made by analysing the pattern of how explicit experiences of DSA is related to the analytical concepts used and what role contextual setting played in the observed pattern.

FRAMEWORK: A HUMAN SERVICE ORGANIZATIONS (HSO) PERSPECTIVE

Education services are created in interaction between the school and the student, why analysing the street-level is of tremendous importance for understanding the impact of public sector digitalization. Street-level discretion is central to a HSO analysis since successful delivery of complex human public services are dependent on the service providers at the street-level. Their situational adaptability and professional knowledge is key for successful interaction with service users (Hasenfeld, 2010; Lipsky, 1980; Osborne et al., 2013). This perspective intuitively fits educational services since interaction is at the heart of education. Discretion is also highlighted in street-level bureaucracy (Lipsky, 1980) where it is argued that street-level bureaucrats, such as teachers, always have some degree of discretion. It is difficult to regulate the work of street-level bureaucrats in detail since practice is unpredictable for government managers and politicians (Lipsky, 1980, p. 14f), why discretion is, besides needed, also unavoidable. The discretion of a school is of immense importance for how autonomously the school can operate in their provision of educational services. In this article, I focus on schools' discretion as the analytical unit. HSO is a research tradition that make use of several theories and below, I present concepts from literature on professions and decision-making theory that is later used to analyse the material.

PROFESSIONAL CAPITAL AND ORGANIZATIONAL LOGIC

The discretion is the space in which the school can act. The school fills this space with professional capital and moral work since their capacity is based on commitment to the purpose of educational services and the professional capital (Hasenfeld, 2010; Hargreaves & Fullan, 2012). Professional capital are the capabilities of teachers to create as qualitative education services as possible and includes expertise

such as expert knowledge, decision-making skills, experience, values, and authority. Hargreaves and Fullan (2012, pp. 59ff, 89) argue that pedagogical professionals often are driven by a substantial ethos, which is also used in interaction, and social qualities such as communicative skills are sometimes included in professional capital (Hargreaves & Fullan, 2012, p. 89ff). There is a risk that organization of work will adversely affect professional capital, since such organization may be based on other logics than the professional perspective.

According to Sachs (2001, p. 151ff), an organizational logic that prioritize external relations and cost-efficiency is present in many schools. She claims the organizational logic impact the professional capital. Professionals become shaped into what she labels entrepreneurs, which focuses on financial aspects and accountability. The professionals´ legitimacy is according to Sachs (2001, p. 152) in this organizational logic based on their economic efficiency and regulation. Evetts (2011, p. 408) writes that performance management, (a common management concept intertwined with MIS (de Bruijn, 2007), can lead to lack of pedagogical professional agency in welfare services. She argues that performance management through performance indicators and performance measures are based on the organizational logic, it emphasizes the entrepreneurial role and threatens the professional capital since it may become appropriated by indicators and measures (see also Schinkel & Nordegraaf, 2011).

DECOUPLING

There are other ideas that highlight the perspective that the representation of work in digital systems may have little or no relation to how work is performed in practice. Gaps between work and how it is formally represented seems to occur in many and diverse government organizations (Brunsson, 1989). Medical professionals in the UK tick boxes in forms just to get on with their 'real' work (McGivern & Ferlie, 2007). Chinese police officers and local civil servants manipulate data to fit management demands (Li, 2015). Soviet managers timed industrial production to just fit the monthly quota because if they worked full effect all month, quotas would get raised until next month (Berliner, 1956). Using this decoupling perspective, DSA may lack relevance for schools' discretion. A similar notion has been presented by Ekholm (2000) who shows empirically that even profound reform of Swedish school management can have little or no implications for the way a school functions. These aspects resemble a third possible effect of DSA – decoupling.

Drawing on the presented ideas, professionals can be primarily expert-oriented (professionals) or entrepreneurial. To analyse how roles are affected and what roles

that are encouraged or discouraged by DSA is one operationalization of discretion while the third option, that DSA may not matter for how work is conducted in practice at all, must also be considered.

IMPLICATIONS OF DIGITAL SCHOOL ADMINISTRATION

Several principals view DSA as productive since it makes their work more efficient. Other claims it is irrelevant for their work and some that it is destructive for their work. Below are examples in each of these categories presented and analysed through the previously presented concepts.

PRODUCTIVE EXPERIENCES

Some principals ask for increased DSA and would like to automate much of the performance measurement. One Swedish principal in a midsized city said that he would like the information on how the school performs to be compiled automatically (Interview G). By "school performance", he refers to student grades. This principal thinks his work with compiling data is neutral regarding values and perspectives, so it is not qualified work or management according to him. He thinks digital administration makes him able to focus on more important tasks such as pedagogical leadership. The same principal (Interview G) use teacher documentation in computer programs for monitoring performance and as basis for quality development work together with teachers. This is professional pedagogical work according to his conception and a practice that is reinforced and supported by DSA. He sees students grades as a good indicator for teacher performance and think the data, that is generated through software, is a good foundation for a discussion on pedagogical development. The software seems to support indicator-led pedagogical discussions. In this case based on an assumption that there is a correlation between students grades and the pedagogical quality of teachers. The practice risks decreasing professional capital by aligning with the organizational logic and therefore emphasize the entrepreneurial role rather than the expert-oriented professional role.

Computer programs that two Swedish principals in Stockholm use contains functions for compiling and aggregation of information. These principals say using the reports from these tools for discussion on quality of teaching is good (Interview H, Interview T). However, when they show me how they do this work in their computer, they use percentages on very small n as indicators on whether teaching

is good or bad. The performance of one or two students makes the difference. The principals don't reflect on whether this is a valid measure or not.

DSA may support organizational stability. Some programs prescribe what documents the school should have, and upload to the software, which highlights that formal documents on work routines and hierarchies and makes them available and transparent in the organization. This is seen as strengthening of the organizational structure by the principal in the Swedish midsized city (Interview G). But it also allows the program content to decide the norm of how the organization should be structured. This can be interpreted as strengthening professional capital as pedagogical professionals doesn't have to care that much about organizational structures, but it can also be decreasing discretion since there is less room for deciding on the organizational structure for the principal. Another aspect of stabilizing organizational structure is that it makes the school less dependent on people, analog organizational culture and structure can be lost when certain people quit their jobs (Interview G). This decrease discretion since it weakens human agency over the organization, culture and structure is given, by the computer software.

It is not only teachers' pedagogical skills that is supervised through software, as shown by two Polish principals. The same software helps the principal in a small city to monitor and evaluate teacher work since she can see if teachers do their paper work in time (Interview P). Another principal regards the digital software as a guarantee for teachers doing proper documentation, motivate grades, and act like a checklist for teacher work (Interview D). This view emphasizes the documentation and administrative work and increase principal authority but may limit teachers' professional capital and discretion.

Software can be used to evaluate parental involvement and take appropriate action when parents are not as engaged as one Warsaw suburb principal would like. The principal can check how often parents have logged into LIBRUS (the local LMS) and contact them if she thinks they are not active enough (Interview P). Log-ins in the LMS serves as an indicator of parental involvement, but parental involvement or engagement can for sure mean lots of other things. The operationalization of parental involvement to log-ins seems as an extreme reduction of a complex interaction.

All of the above accounts reflect a view of DSA as productive since it enables more monitoring, more documentation and more information for managing teachers. What is productive in their view does however not align with the professional role. Monitoring, documentation and indicator-led management of teachers all contribute to the organizational logic. Reducing complexity, increased monitoring, documentation and indicator-led management emphasize the entrepreneurial role rather than an expert role.

REPRESENTATIONS OF IRRELEVANT DSA

Some principals think they don't change their practices due to DSA, they claim DSA are just tools for tasks that they otherwise would have done analogously. The accounts presented in this category shows a reflexive approach to DSA, using the software as they like and disregard functions that they don't appreciate.

One Warsaw principal has a unique competence since he is a skilled programmer. He has designed software for student recruitment by himself. Due to his vast knowledge about programming and computer software, he seems to be able to navigate DSA, using digital tools for whatever he wants at the same time as the schools' autonomy from local government makes him able to ignore the DSA that would affect the school negatively, according to his judgement (Interview W). When the principal is such a skilled computer user, DSA seems to have minor negative impact on his work. This principal is master of DSA rather than the opposite. He displays a reflexive view, analysing what DSA hides and takes that into account in his school management while using the rationalization capacity of DSA aware of what values and practices it carries. He ironically notes that "In VULCAN [name of program], you can even monitor the calories in the school canteen" (Interview W) and thinks this feature is a bit absurd. Another Warsaw school that is very autonomous when it comes to DSA is a top IT-school with a special profile towards IT and programming. The teachers and students modify all programs themselves using their exceptional skills (Interview S). Which also display that IT-skills make a difference.

The principal at a more traditional Warsaw school perform the same monitoring procedures with the digital tools, as she did before with pen and paper. She made statistical analysis on student performance before DSA was introduced (Interview D). This seem quite unique in the material. Most principals have started doing statistical analysis when they got the digital tools that offer that feature. However, if statistical analysis only is made more efficient by digital tools, rather than misused or displace goals, the digital tools really increase professional capital since the principals say that it speeds up their work duties.

A fourth Warsaw principal at an independent school does not use any statistical information for performance measurement, he prefers a conversational approach to evaluate teachers' pedagogic skill. This school don't care about digital tools that much, they have some digital infrastructure, but teachers can use it as they wish, or not. The school seem to be quite autonomous, which seem related to high-trust external relations to parents, and for historical reasons, to the local government. The school have special history. It was among the first independent schools in Poland as

a reaction to the communist processes of government. They have managed to keep this distance to public bodies and authorities ever since (Interview R).

These four principals think DSA doesn't affect their work, however it seems their usage of DSA encourages their professional capital. They take a reflexive stance, making own judgements and master the technical aspects which increase their capacity to interact with students in a productive way since their discretion is not hindered. They take an expert-role emphasizing their professional capital.

DESTRUCTIVE EXPERIENCES

The DSA in a small Polish town enable real time monitoring of school management and expenditure. The software is according to the principal a tool for local government to identify areas that can be downsized. The pressure from the local government is enhanced by the possibilities of monitoring that is offered through the DSA of the school (Interview C). This supervision can be made at any time, the principal doesn't even know when the schools' finances are monitored. The supervision can also be done on unlimited occasions, much faster, more convenient and as often as the local government officials want. The principal therefore experiences these aspects of DSA as destructive, however she responds to this pressure by decoupling administration and accounting from pedagogically professional tasks, protecting discretion of teachers and thereby maintain school discretion.

One Swedish small-town principal highlights that the MIS used at the school supports the work with the annual reports. The most important use of DSA is to create documents that legitimize the school to external pressure (Interview L). He thinks this disrupts the pedagogical focus, but the digital software makes it easier to compile documents that satisfy external audit bodies. This principal role also manage decoupling between how the school is represented and the actual practices, protecting teachers professional capital and thereby enhancing the schools' discretion.

Software indicate what type of documentation that should be made. The Warsaw principal that master digital software says that the computer programs exclude psychological documentation regarding students (Interview W). Aspects of well-being and psychological development is made invisible by the computer programs. Another aspect highlighted by the principal is that the software mainly offers planning, scheduling, monitoring on an individual level. By doing so, the software carries values of individualization and break with processes of planning and scheduling at a collective level as it was made before school administration became digital (Interview W). DSA encourage individualization, making it harder for a school to work with groups. School discretion is decreased and thereby the possibilities of

using the professional capital for deciding on questions of whether planning should be made individually or collectively. This principal displays a reflexive approach, he makes own professional judgements drawing on his professional capital, so DSA in practice makes negligible impact on his work.

The aspects that are experienced as destructive by principals may in practice have negligible implications for school discretion since the principal's buffer pressure and protect teachers professional capital.

CONCLUSIONS

Three counter-intuitive ideas have been generated through is paper. First, when DSA is perceived as productive, it is rather likely to decrease school discretion. Second, when DSA is perceived as irrelevant, it is likely to encourage professional capital and thereby increase discretion. And third, when DSA is perceived as destructive, it rather seems irrelevant for schools' discretion since principals decouple their administrative burden from teachers' practices. Reflexivity seems characteristic for the principals that increase school discretion and promote professional capital. A non-reflexive approach to DSA, internalizing administrative pressure and procedures, seem to decrease school discretion and emphasize the organizational logic, taking on an entrepreneurial role. But a non-reflexive approach that experience DSA as destructive, viewing it as red tape or enhanced control seem to have little impact on schools discretion, rather resulting in discontent with work conditions (which may be a sufficient problem itself). While this pattern of how the native view and the analytical view is interesting in itself, it is also possible to identify contextual antecedents when comparing the principals' views (table 2).

Table 2. Concluding table of coupling and antecedents

Native principal view	Analytical perspective view	Discretion	Role	Country
Productive	Enhancing organizational logic	Is reduced	Entrepreneur	Sweden
Irrelevant	Enhancing professional capital	Is shaped	Professional	Poland
Destructive	Decoupling	Is increased	Buffering manager	Both

Source: own work

The entrepreneurial role and expert-oriented role are clearly connected to country contexts. Two antecedents that are found in the contextual comparison are if the principal is teaching and marketization of the educational system. A principal that also teach may be more grounded in the professional perspective, avoiding co-optation from organizational considerations. Polish principals can be said to have greater professional capital than their Swedish colleagues since they teach on a regular basis and therefore always work with the core activity of the school and meet students in the classroom. A marketized system makes schools compete more with other schools regarding student recruitment which risks displacing the expert-role for the entrepreneurial role. Polish principals experience less pressure from parents and/or the market which makes them able to focus on their core duties. I therefore propose that polish principals more often can take the role of a reflexive expert in relation to DSA. In contrast, I propose that Swedish principals have less professional capital, mostly because they do not teach, and take an entrepreneurial role due to market pressure. One possible avenue to explore for digitalization effects research is the generalizability of this pattern to other HSO-sectors such as for example elder care or even other kind of organizations within the public sector.

Principals that experience DSA as destructive, resulting in irrelevance for the schools capacity to interact, are found in both systems. These principal's role can be described as democratic pedagogue, which wants to balance demands and therefore buffer external pressure, resulting in unaffected school discretion but turns focus to their work environment, asking if such buffering managerial roles are sustainable for keeping the principals at the school and for them not to become overloaded – leading to sick leave. These decoupling principals should be studied in coming research to understand their work in even more detail to understand what contextual factors that are related to decoupling since it'snt possible to trace to national education systems or if the principal themselves are teaching. The reflexive principals who take on the expert-role as well as the ones who align with the entrepreneurial role are more content with their work environment.

Extensive reform in school policy, both in Sweden and Poland, took place after this study was made. In Sweden, a national strategy for school digitalization started being implemented while in Poland, larger reforms changed the structure of the school system and the curricula. Future studies can therefore compare such policy change effects by relating to this study. Despite the calls for further research, this paper contributes to both the literature on school digitalization as well as literature on public sector digitalization by generating the presented knowledge regarding effects on the organizational level.

As a final note, the study also has some implications for practitioners, showing that digitalization is not always the panacea for solving challenges regarding efficacy or quality for contemporary public services, especially schools, on the contrary top-down demands of digital administrative practices often seems to produce more problems and challenges for schools rather than being an efficient tool. When DSA works as such an efficient tool, it is often initiated by the principal themselves.

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Interviews

Interview C 2017-03-08, Small town in eastern Poland

Interview D 2017-03-15, High performing school in Warsaw

Interview G 2016-11-28, School in a mid-sized city in Sweden

Interview H 2017-02-23, School in a Stockholm suburb

Interview L 2017-02-24, School in a small town in northern Sweden

Interview P 2017-03-16, Newly constructed school in a Polish suburb

Interview R 2017-03-20, Independent school in Warsaw

Interview S 2017-03-23, Elite programming school in Warsaw

Interview T 2017-04-24, School in a Stockholm suburb

Interview W 2017-03-14, School in Warsaw

MANAGERIAL ASPECTS IN THE ROLE OF THE HOMEROOM EDUCATOR IN THE HIGH SCHOOLS IN ISRAEL

Noah Bar Gosen
Israel

Abstract

In the Israeli education system, the dual perception of the role of the school, which ranges from the instructional or academic aspects is expressed in two defined roles existing in it: the homeroom educator and the subject teacher.

A research study conducted among 130 homeroom educators and subject teachers in the high schools in Israel (66 homeroom educators, 64 subject teachers) examined the differences in the allocation of the time to everyday tasks and practices in the role of the teaching worker.

The research results indicated that the homeroom educators allocated more time to the practices related to the didactic and pedagogical fields and to the field of case management, in comparison to the subject teachers

There is room to examine the degree of fit between the homeroom educator's investment of time in these practices and the homeroom educator's working conditions, as well as the place given to these managerial aspects in the contents of the professional training to teachers.

Keywords: homeroom educator, subject teacher, role theory, educational aspects, managerial aspects

INTRODUCTION

It is possible to identify duality in the perception of the role of the school, which ranges from the instructional or academic aspects of this institution to its educational aspects. In the Israeli education system, this dual perception is expressed in two defined roles existing in it: the homeroom educator and the subject teacher. The definition of the role of the homeroom educator reinforces educational and managerial aspects of this role. Most of the teachers in the upper school in Israel fill the two roles simultaneously. The question was asked: how are these aspects expressed in the practices that the teachers fill in their different roles? Is there a difference in the emphasis given to the practices from different areas between these two roles?

Examination of the teacher's role, according to role theory, obligates reference to the practices the teacher implements, to the definitions of the role that express in essence the expectations from this role, and to the constellation of the relations that exist between the teacher and the other role-holders that are influenced by the role, namely students, fellow teachers, and the school community. In this research, emphasis will be placed on the characteristics of the practices related to the role of the teaching worker, in her role as an educator, in the high schools in Israel. A research study conducted among 130 homeroom educators and subject teachers in the high schools in Israel (66 homeroom educators, 64 subject teachers) examined the differences in the allocation of the time to everyday tasks and practices in the role of the teaching worker. The teacher respondents were asked to fill out a questionnaire, in which they addressed the differences in the implementation of practices in four different areas of activity: the field of knowledge and didactics, which belong to the academic aspect in the teacher's work, and the field of pedagogy and case management, which belong to the managerial and educational aspects in the teacher's role.

The research results indicated that the homeroom educators allocated more time to the practices related to the didactic and pedagogical fields and to the field of case management, in comparison to the subject teachers. The theme shared by these practices is that they are an expression of the overall responsibility of homeroom educators of different aspects in the life of their students. These practices derive in essence from the role definition of the homeroom educator and emphasize the managerial role alongside the educational role.

There is room to examine the degree of fit between the homeroom educator's investment of time in these practices and the homeroom educator's working conditions, namely, the size of the classes, the number of hours they teach in this class, and the number of hours given to the occupation in his role as a homeroom educator.

There is room to examine the place given to these managerial aspects in the contents of the professional training to teachers.

In the Israeli education system the homeroom educator fills a more central role. It is necessary to examine whether this role exists under optimal work conditions. Focused reference to the homeroom educator's role on the managerial and educational aspects is one of the ways to reinforce the school performance, in favor of the entire school community – students, teachers, and parents alike.

The Israeli education system, in its contemporary characteristics, developed simultaneously with the return of the Jewish pioneers to the Land of Israel and the establishment of the State of Israel (Alboym-Dror, 1985; Alboym-Dror, 1986; Raichel, 1994; Raichel, 2008). From the moment it was founded, the Israeli education system saw itself committed to the educational aspects in the school behavior and not only to the academic aspects that characterize it (Tadmor-Shimony, 2010; Raichel, 1994). For this purpose, the Israeli education system defined two distinct roles in the school system: the homeroom educator, who is responsible for the educational, value-oriented, social, and personal aspects in the students' activity in the school, and the subject teacher, who is responsible for the academic aspects of this activity (Bakshi-Brosh, 2005; Bar Gosen, 2015; Razer, Mittelberg, Motola, & Bar Gosen, 2015). Since the development of the schools in the Land of Israel in essence accompanied the development of the State, great weight is attributed to the educational and value-oriented aspects in the homeroom educator's work (Gordon & Ackerman, 1984; Tadmor, 1999). Different research studies addressed the considerable importance of the homeroom educator's role in the Israeli education system when they emphasize the great meaning of this role both on the level of the student and on the level of the school organization (Bakshi-Brosh, 2005; Bar Gosen, 2015; Notov, 2006; Notov, 2011; Notov & Hazan, 2014; Raichel, 2012; Razer, Mittelberg, Motola,& Bar Gosen, 2015; Zimmerman, 2008).

DISTINCT ROLES IN THE ISRAELI EDUCATION SYSTEM

The definition of the role of the homeroom educator in the Israeli school, as formulated on the Website of the Ministry of Education (Instruction Personnel Service Regulation, 2018) presents a complex role that obligates the creation of a system of relationships with many factors – students, parents, professionals, workers in management, counseling, or paramedical roles in the school and in the community, so that the homeroom educator can provide an answer to personal, scholastic, social, and behavioral needs, both on the level of the single student and on the level of

the class (Bar Gosen, 2018; Notov, 2011). The definition of the role of the subject teacher in the Israeli school, as formulated on the Website of the Ministry of Education (Instruction Personnel Service Regulation, 2018), focuses primarily on the academic and instructional aspects of this role. The differences between the areas of responsibility for which each one of the roles is responsible are presented in Table 1.

Table 1. Areas of responsibility of homeroom educators and subject teachers in the high schools in Israel on the basis of their role definition

Homeroom Educator	Subject Teacher
Main responsibilities * Supporting all educational, behavioral, social and emotional aspects concerning his/her students. * Keeping track of students' academic achievements and conduct at school. * Liaising between the student and the school administration (pedagogical and behavioral aspects). * Responsible for supplementary activities, as well as discussion of current affairs and social and ethical education during homeroom period once a week. * Working in cooperation with the subject teachers. * Maintaining ongoing informative and supportive contact with students' parents.	**Main responsibilities** * Teaching his/her subject according to the curriculum. * Responsible for students' achievements in relevant subject. * Responsible for pedagogic aspects relevant to his subject * Working in cooperation with class's homeroom educator. * Disciplinary incidents are dealt with in cooperation with the homeroom educator.

Source: Bar-Gosen, 2018, pp. 52-53

It is possible to conclude from the areas of responsibility detailed in the table that the homeroom educator has the overall responsibility over the students in his class, since he manages the class and the students are his students (Bakshi-Brosh, 2005; Bar Gosen, 2015; Notov & Hazan 2014). Homeroom educators are responsible for them, both to their parents and to the relevant factors in the school organization (Bar Gosen, 2018; Notov, 2011). Therefore, they must have a regular relationship with the subject teachers. They, in turn, must report to the homeroom educator about difficulties or questions that arise in the framework of their teaching in the homeroom educator's class (Ministry of Education Website, Instruction Personnel Service Regulation, 2018). Hence, the role of the homeroom educator

has managerial aspects (Notov & Hazan, 2014) that do not exist, at least according to the official definition of the role, in the role of the subject teacher.

The many tasks and assignments that comprise the role of the teaching worker, whether homeroom educator or subject teacher, can be classified according to categories that reflect different aspects of this role. As a rule, it is possible to identify three main categories: content, didactics, and pedagogy (Popper-Giveon & Shoyshon, 2018). The category of content addresses the practices that are instructional and academic by nature, which are related to the content world that the teacher teaches. The category of didactics addresses the practices that are instructional and academic by nature, which address the manner of the instruction of the contents of knowledge to the students. The category of pedagogy addresses the practices that are educational by nature and are linked to the relationships between teacher and student. It is possible to add to these the category of "case management", which also addresses practices that are educational by nature but those that characterize processes of management and organization in the context of the student or group of students and addresses the perception of the responsibility embodied in the definition of the role of the homeroom educator (Notov & Hazan, 2014). It would seem that the definition of the role of the homeroom educator collects in it many more managerial and education aspects, in comparison to the definition of the role of the subject teacher.

As aforementioned, the Israeli education system defined two distinct roles that exist alongside one another in the schools. Teachers who teach in the middle school and in the high school in Israel for the most part fill, concurrently, the two roles. The following question is therefore asked. How are these educational and managerial aspects expressed in the practices that the teachers fill in their different roles? Furthermore, is there a difference in emphasis given to these aspects between the two roles? Another question is: what is the degree of fit between the working conditions of each one of the teaching roles and the expectations built in the definition of the specific role?

ROLE THEORY

According to role theory, it is possible to examine roles and evaluate them according to two main parameters. The first parameter addresses the description of the practices and behaviors that the role-holder performs. The second parameter addresses the systems of relationships between the role-holder and the other roles with which he has reciprocal relationships, whether they influence him or he influences them

(Biddle, 1979; Thies, 2009). It is possible to add to these two parameters the constellation of expectations directed at the role-holder from other role-holders, who hold with him a system of reciprocal relationships (Biddle, 1979; Harnisch, 2011; Thies, 2009). These expectations facilitate the establishment of the role definitions through formal processes of auditing and evaluation – principal's report, letters of criticism and/or evaluation, and alternatively a post of praise or criticism on a virtual network. The processes of evaluation are based on the definitions of the role. The unofficial processes of assessment are based on wishes or personal judgment. Both of these contribute to the role-holder's perception of the role.

The definition of the role of the homeroom educator and the subject teacher is phrased officially and appears on the Ministry of Education Website (Instruction Personnel Service Regulation, 2018). These definitions describe the areas of responsibility of the role (homeroom educator or subject teacher), tasks and activities that must be performed in the framework of these areas of responsibility, and the system of reciprocal relationships that he must have with the relevant role-holders, namely the students, fellow teachers, other role-holders in the school and the community, and the students' parents. The official processes of assessment of the teaching workers are guided by the Ministry of Education (RAMA, 2019). The annual Meitzav[5] tests, which examine the school climate, also address the teachers' conduct according to different parameters, primarily those that influence the climate, such as discipline in the lessons and the teacher-student relationship (RAMA, 2018). These assessments focus on the way in which the teaching practitioner fills his educational or instructional role. In the process, there is reference to the practices that the teaching practitioner implements and to the way in which he holds systems of relationships that are obligating by the very fulfillment of his role. In the high schools it is possible to identify differences in the assessment of the teaching workers and in the assessment of the role-holders, such as homeroom educators (RAMA, 2019).

A structured distinction between the role of the homeroom educator and the role of the subject teacher exists in the definitions of the role, in the evaluation of the role, and in the financial reward given to him. This distinction is less

[5] A Hebrew acronym for Measures of School Effectiveness and Growth. The MEITZAV standardized achievement tests are intended to examine to what extent elementary and junior high school students meet requirements based on the curriculum in four core subjects: science and technology, English, mother tongue (Hebrew/Arabic), and mathematics, at two grade levels (5th and 8th). Tests are administered in mother tongue competency in the second grade as well (Razer, Mittelberg, Motola & Bar Gosen, 2015. p. 17). When the tests are external, i.e. checked and evaluated by external personnel from the Ministry of Education, a survey checking school climate is added to the tests. (Bar Gosen, 2015, p.383)

expressed in the processes of professional training for the teachers (Bar Gosen, 2018; Notov, 2011) and in the formulation of the general goals for the education system (MATANA, 2017). Examination of the practices that characterize the two distinct roles in the Israeli education system, the homeroom educator and the subject teacher, can emphasize the shared aspects of these two roles as well as the differentiation between them because of their definition. The examination of the practices can also facilitate in the identification of the main areas of activity of every role and the identification of the practices and skills that should be developed so as to succeed in this role. This is true primarily when talking about the role of the homeroom educator, which encompasses, as aforementioned, many aspects. Through the examination of the practices frequent in this role, it is possible to identify which of these skills characterize the homeroom educator's role and expresses main tenets of the role. The identification can facilitate the more focused adjustment of the homeroom educator's working conditions to the roles that are required from him, as well as greater accommodation of the professional training processes to the managerial and educational aspects that comprise the homeroom educator's role.

RESEARCH QUESTION

The research question at the center of this article examines the differences that exist in the degree of implementation of the practices from different categories, between teaching workers in the high schools in Israel in their role as homeroom educators or as subject teachers. This question is a part of a broad research that examined differences in perceptions and practices between homeroom educators and subject teachers in the high schools in Israel (Bar Gosen, 2018). This question constituted a subsection in the chapter that examines the differences between homeroom educators and subject teachers in the high schools in Israel in the context of the allocation of time for the implementation of practices and tasks that constitute part of their everyday functioning as teaching workers.

It is possible to divide these tasks and practices into four content areas: two are instructional in nature and two are educational in nature (Bar Gosen, 2018). It is possible to hypothesize that because of the different role definitions a difference will be found in the degree of the implementation of the practices from these four areas between the different roles. The research question is: what are the differences between educators and subject teachers in the high schools in Israel regarding the implementation of educational and instructional practices?

RESEARCH HYPOTHESES

Current article refers to the first hypothesis phrased in the general research: Homeroom educators put more emphasis on educational goals and practices in comparison to subject teachers (Bar Gosen, 2018. p. 105). Two assumption can be drawn from this hypothesis:

1. Homeroom educators will allocate more time to the implementation of educational practices.
2. Subject teachers will allocate more time to the implementation of instructional practices.

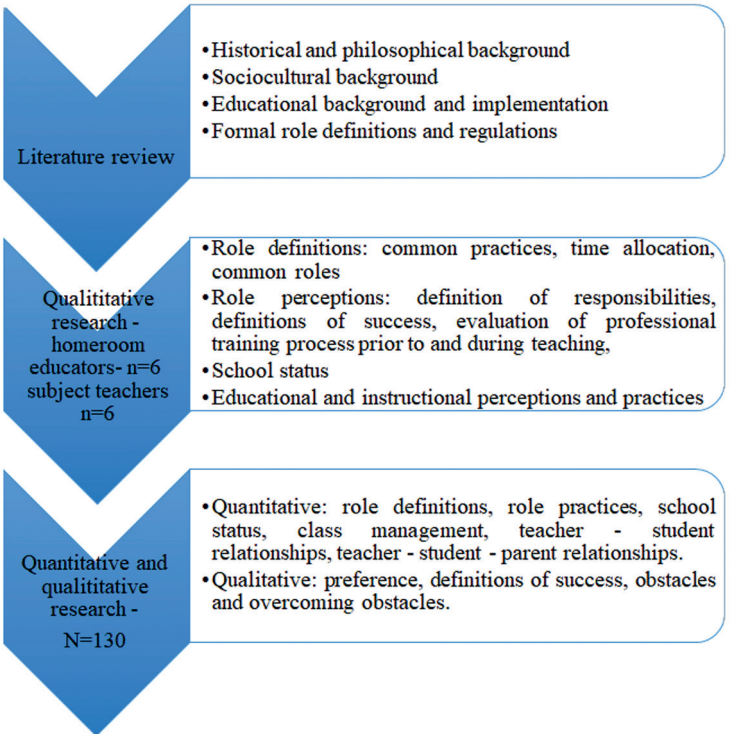
It can be assumed that differences will be found between homeroom educators and subject teachers, in their manner of implementation of different practices and tasks. These differences will help broaden the understanding about the unique characteristics of each role, the skills required for it, and the adjustment of it to the conditions under which the role is performed. While the research question addresses differences between the two roles, this article focuses, as aforementioned, on the role of the homeroom educator, with emphasis on the managerial practices characterizing the role.

METHODOLOGY

As noted previously, the research findings presented here are a part of a broader research that examined differences in the role perceptions and practices among homeroom educators and subject teachers in the high schools in Israel (Bar Gosen, 2018). The broad research used the triangulation method, in which there is the combination of two research methods, the qualitative method and the quantitative method (Denzin, 2012; Guion & Diehl, 2010; Olsen, 2004). The description of the stages of the broad research is presented in the following figure 1.

In this research study, there will be reference to one aspect from all the aspects presented in this research study (Bar Gosen, 2018). This aspect addresses the differences discovered between homeroom educators and subject teachers in the context of the frequency of their implementation of practices and tasks that constitute a part of their everyday functioning as teaching practitioners. The focus on the frequency of the practices enables the differentiation between the role of the homeroom educator and the role of the subject teacher, with the identification of the significant skills in each role. This aspect of the work of the teaching practitioners is examined by the quantitative research method and constituted a part of the online questionnaire.

Figure 1. Process of the Broad Research



Source: Bar Gosen, 2018, p. 108

RESEARCH POPULATION

The research questionnaire was directed at the homeroom educators and subject teachers in the high schools in Israel. The research population consisted of 130 teachers (N=130), of whom 66 are homeroom educators and 64 are subject teachers (M 26, F 104). Of the respondents to the questionnaire, 28 were teachers from the Arab sector (14 homeroom educators and 14 subject teachers), while 102 were teachers from the Jewish sector (52 homeroom educators and 50 subject teachers). 61 of the respondents have a master or parallel degree (29 homeroom educators and 32 subject teachers), and 61 have a bachelor or parallel degree (34 homeroom educators and 27 subject teachers).

The gender distribution between the respondents is rather commensurate with their distribution in the relevant population of teachers in Israel (Bar-Gosen, 2018),

regarding the distribution between homeroom educators and subject teachers. The existing statistical information does not allow for a clear comparison, since most of the teachers fill both roles concurrently, while in this research study the homeroom educators were asked to refer only to this facet of their role.

VARIABLES

Independent variable: The role definition of the teachers. At the start of the answering of the questionnaire, in the chapter that addresses the personal information, the teachers were asked to identify themselves as homeroom educators or subject teachers. The homeroom educators who are also subject teachers were asked to refer in their responses only to their role as homeroom educators.

Dependent variable: The practices and tasks that characterize the everyday functioning of the teaching practitioner in the high school schools in Israel. These practices were chosen on the basis of the findings of the first stage in the overall research, which was based on qualitative interviews with the homeroom educators and the subject teachers. The practices chosen can be classified into four areas, when two areas pertain to the academic instructional facet – the content and didactics and two areas pertain to the educational pedagogical facet and case management. The respondent teachers were presented with a list of practices and tasks. They were asked to evaluate their degree of investment of time, in a given week, for each one of the tasks.

The following table presents the tasks according to the different areas.

Table 2: Division of Tasks according to Areas

Subject content (academic/ instructional practices)	**Didactic** (academic/ instructional practices)	**Pedagogic** (educational practices)	**Case manager** (educational practices)
Attending professional training courses	Preparing lessons	Implementing an intervention regarding students' disciplinary problems	Updating students' information in the computerized school system (Mashov, Manbason and alike)
	Teaching lessons	Participating in students' extra-curricular activities in school	Completing forms regarding students
	Evaluating students' papers and tests	Conducting personal conversations with the student	Organizing students' extracurricular activities in school

	Conducting casual professional conversations with colleagues	Meeting with school counselor(s)/ psychologist	Conducting personal conversations with students' parents
	Attending planned professional meetings with colleagues (i.e. evaluation meeting, staff meetings)		Communicating online with students' parents
			Attending formal planned meetings with parents
			Conducting students' house calls

Source: Bar Gosen, 2018, p. 134

THE RESEARCH PROCESS PERFORMED IN THE THIRD STAGE OF THE OVERALL RESEARCH

Because of the initial nature of the broad research, the decision was made to reach a diverse and large population of teachers, which is not defined ahead of time by distinct parameters. Therefore, the method of the sample chosen was the "snowball" sample. Teachers received the online questionnaire through social networks or Internet websites. The questionnaire begins with a letter of explanation that describes the research goals, its contents, its limitations, the researcher's identity, and the way to contact her. In essence, in the act of filling out the questionnaire and sending it, the respondents expressed their consent to participate in the research. In parallel, printed forms of the questionnaire were distributed, according to request, also in the framework of social networks. The number of respondents of the online questionnaire was 87 (n=87), and the number of respondents on the printed form was 43 (n=43).

The limitations of the online questionnaire focus on the inability to verify the respondents' details (Wright, 2006). The limitations of the printed questionnaire were expressed in the questionnaire's length and the lack of willingness of some of the respondents to answer all the questionnaires, a situation that was not possible with the online questionnaire. Five questionnaires were eliminated because of their very partial response. In a small number of questionnaires, not all of the questions were filled out. This fact was reported in the description of the findings on the different parts of the questionnaire. These limitations were taken into account in the analysis of the questionnaire findings (Bar Gosen, 2018).

The findings of the printed questionnaires were typed by the researcher into a data page in the Excel program. The data were processed by statistical software 8.0. Since the main goal of the research was to examine the differences between two groups of role-holders, homeroom educations and subject teachers, emphasis was placed on the instrument of descriptive statistics (Creswell, 2008). In the statistical analysis of the allocation of time to the different tasks, use was made of the Levene Test to examine the degree of homogeneity of the variables in two independent groups, before the holding of the T-Test (Nordstokke, Zumbo, Cairns & Saklofske, 2011). The alpha level was set at .05 ($p<.05$) (Creswell, 2008). The findings with a lower alpha level were reported as such but were not incorporated in the analysis of the findings and in the process of the confirmation of the research hypotheses.

FINDINGS

The statistical analysis of the questionnaires indicated that in a number of tasks a significant difference was found in the degree of the allocation of time between the two roles, homeroom educators and subject teachers in the high schools in Israel. The following table describes the tasks in which a significant difference was found in the allocation of time.

Table 3. Significant differences in the allocation of time between homeroom educators and subject teachers in the high schools in Israel

	Mean Homeroom educators	SD Homeroom educators	Mean Subject teachers	SD Subject teachers	t-value	p
Conducting casual professional conversations with colleagues	3.435	2.539	2.016	1,476	3.805	p<.01
Planned professional meetings with colleagues	3.277	1.691	2.214	2.757	2.609	p<.05
Implementing an intervention regarding students' disciplinary problems	2.806	2.267	1.694	2.711	2,450	p<.05

Meeting with school counselor(s)/ psychologist	1.757	2.025	0.545	0.576	4.504	p<.01
Conducting personal conversations with students' parents	2.166	2.016	0.962	0.939	3.414	p<.01
Completing forms regarding students	2.053	2.815	1.157	1.552	2.186	p<.05
Communicating online with students' parents	2.170	3.181	0.740	1.279	3.206	p<.01

Source: Bar Gosen, 2018, p. 135-136) (Total: N=130 (HE n=66, ST n=64)

The tasks and the practices in which differences were found between homeroom educators and subject teachers pertain to the didactic and pedagogical areas and case management. In all the tasks in which significant differences were found between homeroom educators and subject teachers, the allocation of the homeroom educators' time was greater.

FIELD OF DIDACTICS

Regarding two tasks in the field of didactics, it was found that the differences between the allocation of time of the homeroom educators and the allocation of time of the subject teachers are statistically significant. The tasks are holding occasional conversations with colleagues (p<.01) and holding planned conversations with colleagues (p<.05). Lacking the details on the nature of the conversations, it can only be thought that the homeroom educators make certain to a greater degree than do the subject teachers to hold conversations with the colleagues. Homeroom educators, according to the definition of the role, are responsible for the overall behavior of the students who belong to their class. It is possible to attribute this tendency to the holding of occasional and planned conversations with fellow teachers for the purpose of updating in the events of the lesson or in the conduct of students who belong to the field of responsibility.

FIELD OF PEDAGOGY

Regarding two tasks in the field of pedagogy, it was found that the differences between the allocation of the time of the homeroom educators and the allocation of the time of the subject teachers are statistically significant. The tasks are holding meetings with the school counselor/ psychologist (p<.01) and implementation of

processes of intervention because of discipline problems of students ($p<.05$). In the definition of the homeroom educators' role there is the holistic responsibility for all aspects of the student: academic, behavioral, social, and personal. As a part of this responsibility, the homeroom educators are responsible also for the conduct of the students who belong to their class, in the different lessons and in general in the school. It can be hypothesized that the meetings with the school counselor/ psychologist and the implementation of processes of intervention with the goal of dealing with the students' discipline problems are an outcome of this defined responsibility.

CASE MANAGEMENT

Regarding three tasks in the field of case management, it was found that the differences between the allocation of the time of the homeroom educators and the allocation of the time of the subject teachers are statistically significant. The tasks are the filling out of forms regarding the students ($p<.05$), the holding of online communication with the students' parents ($p<.01$), and the holding of personal conversations with the students' parents ($p<.01$). These tasks are related also to the overall responsibility of the homeroom educators for the students in their class. This responsibility includes administrative aspects, such as filling out forms. In addition, the role definition of the homeroom educators clearly notes their responsibility to maintain regular contact with the students' parents. This relationship is also perceived as a part of the overall responsibility of the homeroom educators for the students in their class.

The tasks in which a significant difference in the allocation of time was found between the homeroom educators and the subject teachers in the high schools in Israel belong to three different areas. However, it is possible to find in them a common characteristic. These tasks derive from the homeroom educators' role definition, which attributes to them the overall management responsibility for the different aspects in their students' behavior. It can be said that this managerial responsibility, which deviates from the academic instructional aspect, distinguishes the role of the homeroom educators from the role of the subject teacher in the high schools in Israel.

DISCUSSION

The Israeli education system has assumed upon itself, since its establishment, the overall responsibility for the education of the students of Israel (Di Nur, 1968). This responsibility is expressed both in the mandatory character of the education system

and in the fact that it is, according to the definition a system that engages both in educational aspects and in academic aspects (Dovrat, 2005). For this purpose, in the system two distinct roles were defined: the homeroom educator and the subject teacher, who are responsible, each because of his role, for one of these aspects (Ministry of Education Website, Instruction Personnel Service Regulation, 2018). The perception of holistic responsibility strengthened the homeroom educator's status as having a significant role in the Israeli education system. The structural characteristics of this system are the division into classes for which every homeroom educator is responsible, the reference to students as belonging to the homeroom educator (Bakshi-Brosh, 2005; Bar Gosen, 2015; Notov, 2006), and the broadening of the tasks assigned to the homeroom educator. As a result of his role definition, his status was established as the manager of the class in actuality and as having the management responsibility towards the school administration, his fellow teachers, his students, and their parents (Bakshi-Brosh, 2005; Bar Gosen, 2015; Notov & Hazan, 2014).

The research findings indicate that in actuality the homeroom educators allocated greater time to the tasks in the didactic, pedagogical, and managerial domains. The tasks in which a significance difference was found in the allocation of time between the homeroom educators and the subject teachers in the high schools are the holding of occasional and planned conversations with the teacher colleagues (didactic field), the holding of meetings with the school counselor / psychologist, and the implementation of processes of intervention because of student discipline problems (pedagogical field), and the holding of communication with the students' parents both in meetings and online (managerial field). The common denominator of all these tasks is that they are an expression of the overall responsibility of the homeroom educators towards their students, since they are the managers of the class.

It can be said that in the present structure of the school groups of students are created for whom a distinct teaching practitioner has responsibility, namely the homeroom educator. Thus, every student in the school has a defined group to which he belongs and a clear "address" in the school to which he turns for any matter (Bakshi-Brosh, 2005; Bar Gosen, 2018). In parallel, the school administration, the fellow teachers, and the school staff as well as the students' parents have a clear address for the identification of the teaching practitioner responsible for each and every student (Bar Gosen, 2018, Notov, 2011, Notov & Hazan, 2014). This management structure is commensurate with the recommendations of the OECD for the promotion of the school inclusion and the dealing with a variety of students, which note the importance of the teacher's role as supporting, encouraging, and helping on the basis of the interpersonal relationships formed between the teacher and the student (OECD, 2012).

Hence, the homeroom educators serve not only in the instructional and educational role but also in the role that has distinct managerial aspects. These aspects serve both the students and the school community. Here is the place to ask whether the existing training of teachers provides the teachers with training that directs towards these managerial skills. Another question that arises from these findings addresses the work conditions of the homeroom educators and whether these conditions enable the optimal performance of the managerial aspects of the homeroom educator's role.

The training of teachers in Israel has experienced a significant change in recent years, in that it has become based in the field. The combination between the academic facet and the applied facet, as can be learned from the Academia-Class' Program, emphasizes the need to connect between areas of knowledge required for the fulfillment of the instructional and educational roles of the teaching practitioners, in connection to the working conditions in the field. From an early stage in the process of training, the student teachers are integrated in the school work and receive in the school guided instruction, in addition to their academic training (Ministry of Education, 2014). However, it seems, that today as well, in this training there is insufficient differentiated reference to the distinct roles that exist in the education system, the role of the homeroom educator and the role of the subject teacher. The following question is thus asked: does this training emphasize the significant managerial aspects in the role of the homeroom educator?

Homeroom educators in high schools in Israel serve in their role in parallel to being subject teachers. The mean number of students in the class in the high schools in Israel is around 30 students (Ministry of Education, 2017). The homeroom educator teaches in his class 2-3 hours of education a week, in addition to the short morning meetings (in some of the high schools). It is recommended that he accompany his students during the extracurricular activities that are held in the school framework (Ministry of Education Website, Instruction Personnel Service Regulation, 2018). Not all homeroom educators serve as subject teachers in their homeroom class. The question is asked: under these conditions, of a limited number of hours a week with the addition of certain social activities, can the homeroom educator achieve an in-depth recognition of all his students, one that will enable the establishment of relationships of trust between the student and the homeroom educator and make the homeroom educator into a meaningful educational figure for the student?

The administrative roles of the homeroom educator are many. He is required to collect information about the students from all the class teachers, to concentrate information, to write reports, to meet with professionals, to represent the students in the assessment meetings, and to maintain a regular relationship with the students'

parents (Ministry of Education Website, Instruction Personnel Service Regulation, 2018). Thus the question is: does the structure of the position of the homeroom educator in the high school in Israel really advance the optimal performance of these managerial tasks?

CONCLUSION

The research findings show that there is a difference in the allocation of time between the homeroom educators and the subject teachers in the high schools in tasks associated with the didactic, pedagogic, and managerial aspects of their role as teaching and education practitioners. The role of the homeroom educator encompasses different managerial aspects that derive from the perception of the overall responsibility that is at the basis of the definition of the role. This perception of the role corresponds well with the definition of the school mission in the Israeli education system, as both educational and academic. There is room to examine whether these role requirements exist under optimal working conditions. The focused reference to the role of the homeroom educator, in its managerial aspects, is one of the ways to strengthen the school performance, so as to benefit the entire school community – students, teachers, and parents alike.

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ROLE OF HEALTH PROMOTION IN EDUCATIONAL LEADERSHIP

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Abstract

A school is a unique place, where young people learn, develop and socialize. It is an institution where basic knowledge of the world and social life is shared. It is an organisation which has a real impact on creating equal opportunities and on an individual's later life. The school system has a significant impact on all individuals and their social development, making it the subject of countless discussions and frequent assessments.

For over 25 years Poland has been making constant changes in its education system. It is the sector that undergoes the most frequent and most extensive reforms. Decision makers change its structure, form and teaching contents, subjecting the system to continuous evaluation. The aim is to improve the conditions and quality of teaching. While looking for efficient solutions, decision makers have been relying on economic management sciences, focusing on financial and material resources and on improving the technical infrastructure of schools. Over time they started to notice that such solutions are insufficient, so they began to direct their attention to the concept of educational leadership, based on specific values, with comprehensive student development in the very heart of the process.

Keywords: educational leadership, educational management, health education, health management, health promotion

1. EDUCATIONAL CHALLENGES BASED ON POLAND'S EXAMPLE

We should remember that a school is an educational institution focusing on the fulfilment of teaching tasks and objectives, as well as caring for and raising children, youth and adults. Well-qualified staff, parents, environment, structural and educational facilities all play an important role in the achievement of its goals (Stankiewicz, 2000). Sajdak adds that "the aim of educational activity is to support the learner in the realisation of their own potential" (Sajdak, 2013, p. 356), while the educational environment needs to be facilitating and responsive to the needs of learners. Whereas "teaching strategies need to be directed at joint achievement of educational objectives and at satisfying the needs of students" (Sajdak, 2013, p. 356).

For the sake of clarity it should be noted that a school operates within the scope of three basic functions: teaching, upbringing, caring. The school's teaching function involves systematic and orderly transfer of academic knowledge. The upbringing function is linked directly to the development of the pupil's personality and to shaping prosocial, moral and idealistic attitudes; it develops sensitivity and tolerance; prepares the student for leading an active life in the society. Whereas the caring function is related to providing students with necessary care, creating the right environment for learning and resting, and looking after their wellbeing and safety (Maniek, 2016). Therefore, a school can only achieve success if all actions in all these areas are coordinated. However, a successful school is also, from the perspective of management, an organisation whose management structure is flattened; authority is delegated appropriately; resources are managed reasonably; time is well-spent; data on teaching performance is well-managed; focus is placed on educational foundations. Such a school also acts as a training centre for teachers. It is a school where people enjoy positive relations and where all special needs of students are met; it is also a place which creates a structured, aesthetic and most of all safe environment (Elsner, 2006). The importance of safety was also highlighted by Maniek, whose research showed that in order for a school's didactic process to run correctly, the school needs to be safe (Maniek, 2016, p. 58), which indicated the aspect schools have been focusing on in recent years.

In order to satisfy the numerous requirements with regard to schools, Poland drew inspiration from economic management, attempting to bring some of the solutions used in the world of economy straight into the educational sector. As noted by Dorczak, "educational management has been in development for several decades, in terms of Poland since the early 90's. Similarly to other countries, the development of managerial thought in education has been dominated (and still seems to be dominated) by attempts to build theory and practice based on a simple transfer of solutions from general management theory in its most common form,

which dominated that arena in the context of the neoliberal ideology of the 80's. This managerial approach mainly focuses on the formal, legal, financial, organisational and technical aspects of school management, considered the key to increasing efficiency and quality of the school's operation. Moreover, it is also considered obvious that different theories with practical solutions and management techniques developed with regard to organising the economic sphere can be used in any other sphere, such as education" (Dorczak, 2016, p. 7). It should also be stressed that the last 25 years have been a period of significant, continuous changes in Polish education. Such reforms covered different aspects of the operation of the education system, such as curricula, school system structure, grading and examination methods, pedagogical supervision methods, teacher training and many other detailed issues, making school staff feel tired and discouraged (Dorczak, 2015b, p. 11).

Therefore, in recent years Poland has been focusing on perfecting technical aspects, providing the right infrastructure and the best facilities; however, people are slowly running out of ideas on what to do to make school operations even more beneficial to the society; on what to do, as noted by Mazurkiewicz, to ensure that educational management truly helps organisations and individuals learn, which should lead to individual, organizational and social development (Mazurkiewicz, 2011, p. 195). What to do to ensure that schools contribute even more to the individual and common good? The solution may be educational leadership based on values as well as recognition of the role and meaning of health promotion in schools.

2. SIGNIFICANCE OF EDUCATIONAL LEADERSHIP

To summarise the considerations presented to this point, "there is no doubt that if a school is to work well in an increasingly difficult an demanding environment, it needs efficient leaders" (Madalińska-Michalak, Kołodziejczyk, 2015, p. 131). According to Maniek's research, expectations with regard to school principals are growing continuously. They need to act efficiently, quickly and fairly; they need to provide support and motivation to other teachers; they should promote multidirectional communication at school between teachers and pupils (Maniek, 2016, p. 60). Therefore, principals have to go beyond everyday administration of a complex organisation; they need to play the role of teaching leaders and local community leaders, at the same time acting as visionaries who inspire and motivate others to act on an everyday basis (Maniek, 2016, p. 60). Therefore, an educational leader should be someone "who, most of all, has the gift of persuasion and the power to bring out other people's potential. It is possible because such a leader can adopt the right

approach towards himself, the world and the school through self-discovery and awareness of the role, needed to build a self-learning school" (Mazurkiewicz, 2011, p. 55). Moreover, an educational leader also needs to know how to make people learn (Mazurkiewicz, 2011, p. 2015).

However, most of all we should remember that educational leadership should complement management. Educational leadership and management introduce the value in learning and in individual development (Dorczak, 2015a, p. 50). "A school principal, who plays her/her role well, in the scope of school management processes places focus on the implementation of tasks and achieving results (management), as well as on people and processes (leadership). While seeking managerial standards, they keep the balance between leadership and management, believing that these processes complement each other and help create a school which becomes an attractive facility for its pupils and teachers working for the benefit of those pupils. The leadership of a school principal, due to the area of social life it relates to (education) and its potential to drive changes and development of individuals, teams, institutions, organisations, networks and systems on various levels, should be an educational leadership not only because the school is where education takes place, but mainly because of the educational objectives and characteristics of that leadership" (Madalińska-Michalak, Kołodziejczyk, 2015, p. 132).

Therefore, "an investment in leadership is an investment in the future of education (…). The education systems and schools we know have exhausted their potential of creating and changing the world. Educational leadership, open to people, their needs and skills, gives us hope that as always people will be able to cope with even the most difficult tasks – thanks to creativity, imagination, cooperation and courage" (Mazurkiewicz, 2015, p. 52). Especially that a school may become a source of social change (Mazurkiewicz, 2011, p. 254), so in line with the responsible school principle (see Mazurkiewicz, 2011, p. 116) we should consider expanding the role of health promotion in the educational leadership process. We should take responsibility for creating specific solutions and constructing the reality (Mazurkiewicz, 2011, pp. 279–280) in the scope of health promotion already at the level of early school education.

3. ROLE OF HEALTH PROMOTION IN THE EDUCATIONAL LEADERSHIP PROCESS

It should be noted that the basic obligation of the state is not only to provide its citizens with access to healthcare services when they are faced with an illness or suspected illness, but also to take actions, such as:

- actions aimed at shaping desired health-oriented behaviours;
- reparative actions to remove pathogens, minimise their effects and compensate for any dysfunctions caused by them;
- preventative actions directed at minimising and removing the threat of disease (Wojtczak, 2009, pp. 9–12).

Those tasks should be implemented already at the primary school stage and continued throughout the educational process, as only in this way can we ensure their efficiency.

Although we should remember that irrespective of healthcare programmes implemented on the national and local stage, the law describes the organisation of preventative healthcare services for children in mandatory school education, other mandatory education and children in post-secondary education according to the regulation of the Minister of Health of 28 August 2009 on the organisation of preventative healthcare services for children and youth (Journal of Laws of 2009 no. 139 item 1133), which indicates that such healthcare services may be provided, among other, by school nurses (Bromber et all, 2015, p. 45). However, health promotion activities should be implemented in schools on a much wider scale than a rare contact between the children and the school nurse during routine preventative check-ups or sporadic lectures. It is an important aspect, as a social study from 2014 (Bromber et al.) indicates that Polish citizens have a very negative opinion on the Polish healthcare system, which means that probably it does not do its job, thus the role and significance of health promotion at the early education stage is growing and should be embedded in the idea of educational leadership, which has potential to change the Polish reality for the better. The need to introduce the idea of health promotion at an early age arises from not only the popularity of unhealthy lifestyles, but also from the fact that many risky behaviours are a result of a lack of knowledge, bad habits or trends (Korporowicz, 2015, pp. 148–150).

For the sake of clarity we should also remember what health promotion actually is. Namely, "it is a social process of an educational character, aimed at improving the society's health (…)". It should be added though that these days health promotion goes beyond shaping knowledge and skills with regard to health-oriented behaviours, which are also the subject of health education, as the former also includes creating environments favourable to health and getting the members of the society actively involved in matters related to health, while also providing information and educating health managers and promotors (…). In accordance with the principles of health promotion:

- health needs to be protected from threats, as well as strengthened and developed through social activity, through the use of different methods and manners of communication, implementation of the principles of education, social policy and health policy; (…)
- health should be strengthened by way of active participation of all individuals and a close cooperation with the social environment, i.e. school, home and workplace (Korporowicz, 2015, pp. 149–150).

This is a form of a developing, democratic approach to health, which is evidenced by the new tasks imposed on school, family and self-government that require actions integrated within the individual areas of interest. "As part of these actions, the society, especially the youth, should be taught how to cope with difficult situations and stress, and at the same time be protected from turning to additions or – which started occurring in recent years – from excessive beautification of their own bodies and medicalization of the social life" (Korporowicz, 2015, p. 153). It should be noted that some activities within that scope have already been implemented as a result of the First Convention on the European Network of Health-Promoting Schools from 1997, during which such conclusions were made as:

- every young person living in Europe has the right to learn in a health-promoting school, which is a sign of the democratisation of public life;
- a health-promoting school is an initiative aimed at developing education and democracy on the local level (see Korporowicz, 2015, pp. 160–161).

As a result of the conference, a document entitled „Health21 – Health for all in the 21st century" was created, based on which many projects were developed to support the idea of health promotion in local communities. One of the main objectives of the project was to establish "health-promoting schools", which combine collective health education (among youth, teachers, workers) with a health ethos at school and actions aimed at improving health and wellbeing of the entire school community. The principles which need to be followed for such a school to function correctly are:

- health education, which needs to be implemented and integrated with the curriculum;
- consistency between health education implemented at school and observations made at the school premises, i.e. consistency between the educational

contents and declarations and actions taken not only in the school environment, but also in the family environment;
- health-oriented actions performed in an atmosphere favourable to learning, rest and mutual acceptance between teachers and students;
- cooperation between students, teachers, parents and local authorities in creating health-oriented environments;
- health ethos at school and mutual respect and kindness among students, teachers and school workers expressed through cooperation, honesty, support, communication, joint decision-making and responsibility;
- transparency of the rules of conduct, principles, hierarchy and structure linked to a transparency of regulations, procedures and methods of their enforcement;
- independence linked to autonomy and courage in thinking, expressing one's opinions and feelings, and conduct;
- building a safe and democratic environment favourable to physical, psychological and social development of all students;
- creating the basis for change and modification of behaviour, conduct, learning, teaching and school management;
- jointly organising and participating in meetings and events dedicated to health (Korporowicz, 2015, pp. 160–164).

In order to implement such a system, cooperation between students, teachers, workers, parents and local authorities is required, which is also an issue discussed in terms of progressive health management (Korporowicz, 2015, p. 27), taking into account local influential factors, i.e. recognising the role of active cooperation and participation of local communities in deciding on how social needs can be satisfied, including most of all health-related needs.

To summarise these considerations it should also be added that the Polish health protection system also faces various challenges related to the growing problem of insufficient resources (Kautsch, 2015, p. 555), growing patient expectations, growing prevalence of lifestyle diseases and ageing society. At the same time it seems that educational management and leadership have already exhausted their capacity for further development of the school as an organization and of its students, therefore, it is necessary to seek new areas of activity to help improve and broaden the learning process. A solution to the problems found in both sectors: health protection and education, may be health promotion, implemented systematically and consistently as part of the educational leadership process at Polish schools.

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THE CHILDREN INCLUSION FORGOT: IMPROVING THE LIVES OF MOST – ABLE NINE AND TEN YEAR OLDS... A FOCUS ON WELLBEING

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Abstract

This chapter explores the most-able pupil's perceptions of their own wellbeing and the impact that the introduction of a wellbeing intervention can have on them. Additionally, insights into the academic attainment of the most-able is explored, and the under attainment of the most-able is also explored using an international scale. The study uses both qualitative and quantitative methods and a phenomenological approach is adopted, with interviews being used to explore the lived experiences of the participants. Exploration of the area of research has been conducted with seventeen Year 5 (age 9 and 10) pupils from a large school on the edge of London in England. The analysis demonstrated an improvement in wellbeing following the intervention strategy and also a correlation between improvements in wellbeing and academic attainment.

Keywords: most-able pupils, wellbeing, intervention, attainment

1. INTRODUCTION

A focus on wellbeing within the school setting has become a topical issue in English education within recent years, with many arguments stating that 'Education policy in England increasingly encourages schools to maximize students' academic attainment and ignore their broader wellbeing' (Bonell, 2014). Such a statement creates the notion that those capable of high academic performance are likely to be under considerable pressure to attain at a high level.

Pressure to cater appropriately to the needs of the most-able is furthered by Ofsted (the body responsible for school inspection in England), with frequent reports citing a lack of challenge for the most-able pupils to be an issue within schools, and former Chief Inspector Wilshaw asserting that still 'too much talent is going to waste' (2016) as schools do not stretch the brightest pupils. Whilst the PISA (Programme for International Student Assessment) results in 2018 have begun to show some improvements amongst the most- able pupils, as in 2013, 14 countries had a higher proportion of pupils achieving at the highest level in reading assessments, and in 2018 this had declined to 9 countries it is clear that performance still has scope for improvement (Sizmur et al., 2019, p. 32).

Clearly, within such national policy and guidance there is belief that the most-able children within England are not performing at the standard of which they are capable and not at a level which could be considered competitive on an international scale (Ofsted, 2013).

Porter (2005: 60) examines the specific needs of the most-able learners, adapting Maslow's (1943) earlier model to reflect the needs of all learners, creating a subtly different argument- that the needs of the most-able learners are the same but it is that which is required to fulfil them that is different. Porter's model shows three main areas of need:

- **self- esteem**
- **belonging**
- **autonomy**

She then argues that gifted children are often aware at a young age that they are somewhat different from their peers, and find that they lack intellectual equals within their setting. They therefore find themselves lacking in autonomy and intellectual challenge. Both of these factors lead to an increased risk of self- esteem needs remaining unmet (Porter, 2005).

1.1. THE CASE STUDY SCHOOL

The academy (a state school in England which is directly funded by the Department for Education and is independent of local authority control) which this article is based on places an emphasis on the pastoral side of education, offering support to local families and prioritising wellbeing over attainment. Whilst the school's results are below the national average with 48% of pupils in 2018 achieving the expected standard in Maths, Writing and Reading whilst the national average sits at 64%,

the progress made by pupils in 2016 was significantly above the national average as shown by the GOV.UK progress scores, which rated progress in maths as 'well above average'- indicating the high quality of teaching and learning but also the low starting point many of our pupils are faced with. During the period of research, the academy had no Ofsted rating, but shortly after the research finished an inspection was conducted and the academy was rated 'Good'.

2. CRITICAL LITERATURE REVIEW

This critical literature review focuses on the emergent themes of: wellbeing policy, wellbeing needs, English national context and academic attainment.

2.1. WELLBEING POLICY

'Gifted' (most-able) learners are defined by the Department for Education as being learners 'who have one or more abilities developed to a level significantly ahead of their peer group' (2007). Whilst a definition of gifted exists, there is little in the way of guidance and testing policy in order to identify these children. Common practice is simply that schools identify the top 5–10% of pupils. However, when we consider SEN (Special Educational Needs) identified children, policy is much clearer as whilst 'gifted' can be set with the different contexts of individual schools and no national standard or strategy exists in England to identify leaners, a child with SEN would carry their 'label' with them should they move school (Freeman, 2002). This is not a guarantee that policy affords to the most-able pupils within schools, should they move school they may not be considered to be gifted within their new setting.

2.2. WELLBEING NEEDS

The need for a particular focus on the wellbeing needs of the most-able pupils is supported by researchers such as Geake (2007). Geake's research highlights a significant link between advanced learning/ performance academically and increased levels of emotional intensity and sensitivity, something argued to be a result of highly efficient communication between gifted individual's limbic systems and their prefrontal lobes which drive our metacognitive functions serving to oversee our learning. Whilst a complex concept to consider, the resultant vulnerabilities demonstrate a clear reasoning for wellbeing interventions for our most-able as they include (but are not limited to): low self- esteem, depression, perfectionist traits,

emotional intensity and increased levels of suicide ideation compared to their non-gifted peers.

The work of Butler-Por (1987 in Stopper, 2000) further supports the notion that what is needed to ensure 'joy in learning' varies for the most-able pupils. Butler- Por (1987 in Stopper, 2000) suggests several social- emotional and motivational factors that children need to experience both at home and in school in order to grow and sustain a positive mentality towards school learning. These requirements include: social and emotional factors such as autonomy, confidence in self and initiative and motivational factors such as support, a suitable level of challenge and engaging stimulus.

2.3 ENGLISH NATIONAL CONTEXT

George (2011) argues that most-able students often find themselves bored within class by a lack of suitable challenge and as a result effort and performance decrease. Alternatively, Black (2001: 4) posits the idea that pupils are held back by their desire to get every answer correct and receive top grades, meaning that they are unwilling to work outside their comfort zone, as doing so presents a risk they are unwilling to take. Whilst the reasoning presented by these scholars is varied the result is the same- fractured emotional wellbeing regarding a readiness to work (whether a sense of apathy or fear of risk) is undermining the ability of gifted students, on a national scale, to perform to their maximum ability academically.

Such pressure to focus on academic achievement can be linked to international results, with the UK consistently having lower PISA (Programme for International Student Assessment) than developed competitor countries such as Singapore and Estonia. This is demonstrated in the 2018 PISA results, which saw the UK sit in twenty third place for its average score of PISA mathematics, reading and science (PISA, 2018). Resultant pressures on raising attainment can be seen in comments made by Russell Hobby (former leader of the National Association of Head Teachers, current CEO of Teach First) in which he argued that results in recent years represent a 'lost decade' and that the government has had 'little impact on either standards or equity' (Pells, 2016). Naturally, in order to raise the international ranking of the UK in PISA results, attainment at the top must improve.

Whilst many strategies and pieces of research exist about the underachievement of the most able- setting, academic interventions, academic mentors, my reading has led me to realise a lack of research surrounds considering the wellbeing needs of gifted pupils, and interventions focussed on emotions and creativity rather than academia, an assertion supported by the work of Hoge and Renzulli (1993).

However, the new Ofsted Framework (2019: 4) states that it aims to bring about improvement for all in education provision. Therefore, it is possible that the underachievement of the most-able will be more closely considered with the implementation of this inspection framework.

2.4. ACADEMIC ATTAINMENT

Underachievement is defined by The National Association for Gifted Children (2019) as 'the unanticipated difference between accomplishment and ability.' It is important to note that it is underachieving in relation to the individual ability of the pupil being considered, rather than achievement in comparison to age related expectation.

Research such as Richert's (1991) has suggested that roughly half of all identified most- able pupils do not perform to their potential academically (National Commission on Excellence in Education, 1994), notably this is an estimate which does not include the thousands of pupils who are not identified as being most-able, a common issue as schools rarely have clear policy on identifying their gifted learners (Peterson, 2001). In the face of such statistics, it is unsurprising that the National Excellence Report notes a 'quiet crisis' in the education of our most-able pupils- it is considered a 'quiet' crisis as there are few people advocating for underachieving gifted children who are undoubtedly being failed.

Neihart and Betts (2010) found that the most common characteristic identifiable among gifted underachievers is that of low self- esteem. The children felt that they were not capable of reaching the standards that their families/ teachers expected of them and what they expected of themselves. Within this piece of research it was concluded that the low self- esteem experienced by these students was directly related to pressure to 'be gifted'.

To summarise, the literature suggests that the main issues regarding the wellbeing of gifted pupils are: the provision within their schools, complexities of policy surrounding the group, pressures of testing and the need to achieve at a high level coupled with underachievement of gifted pupils both comparative to own abilities and on an international scale.

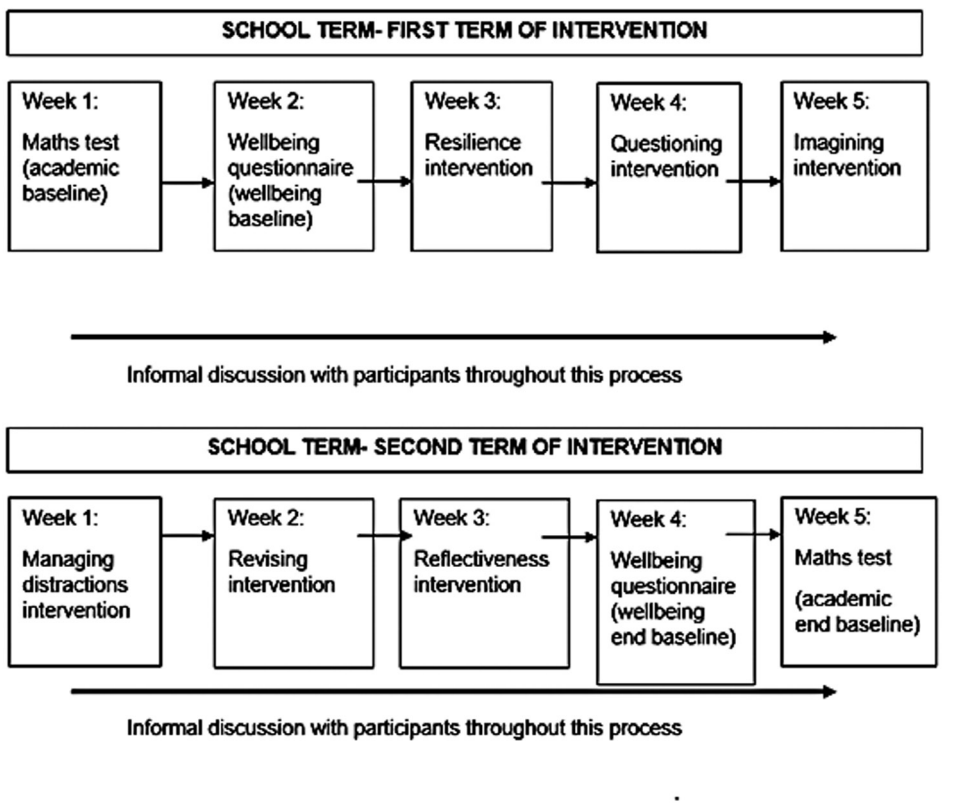
3. METHODOLOGY

The research for this article was of the phenomenological approach whereby the research acts as a reflection of the lived experience of a human (Van Manen, 2007). The reflections then represent the perceptions and thoughts of the participant to researchers.

I have used a mixture of 'specialist group sampling' and 'convenience sampling' as explored by Newby (2010). Convenience sampling refers to a method that researchers use largely due to ease of access to participants (Newby, 2010, p. 257). The study I have conducted needed to completed using primary age children, and as I work as a primary school teacher I was well placed to a group of potential participants. As I have selected a focus on giftedness I also used 'specialist group sampling', Newby (2010. P. 255) described this as "occasions when a research project needs… a description of behaviours or activities from a closely defined group'.

3.1 AN OUTLINE OF THE RESEARCH PROGRAMME

Scheme 1. An outline of the research programme



Source: own work

The overall aim of my study is to consider whether an intervention can improve the wellbeing of the most-able children and support their feeling ready to study. This also aims to look at whether the pupil's academic attainment improves alongside the sessions provided.

I decided on a quantitative and qualitative approach and then began to consider the best possible ways to collect data. Safford and Hancock (2011, p. 10) have posited that classroom research is often 'presented as a narrative or story'. It was my aim that this would not be the case with my research, whilst I wished to include samples that 'draw upon children's words' (Safford and Hancock 2011, p. 10) I also wanted to ensure that my research would contain a quantitative strand, allowing me to present numerical proof within my findings which could aid further study after the completion of this project. The particular focus on the attainment of the most-able students by organisations such as Ofsted (2016) meant that I felt the inclusion of data on attainment would lay better groundwork for the furthering of this study, keeping it in line with national educational priorities.

Therefore, questionnaire, interviews and academic test scores were used in order to gather data for this article. The questionnaire sought to consider how pupils judge their own wellbeing by considering their emotional responses to a range of differing situations they will face as gifted student. Within the interview portion of study there were four different questions posed to the participants over the course of study, though no child was obligated to give answers at any point. At the beginning of the questions, there was also a scale (using a smiley and sad face) to indicate the children's feelings towards the sessions. The method used to establish the beginning and end academic baseline for the participants was using their assessment papers which are conducted on a termly (6 week) basis at school. The participants took the papers both before and after the intervention programme. It is important to note that almost two academic terms had passed between the tests, terms in which the pupils all received many lessons which could also have impacted upon their results.

This study was specifically designed in order to gain an understanding as to whether the introduction of a wellbeing intervention could positively impact on both the children's reported wellbeing and their academic attainment. As the success of the study was not guaranteed, fully immersing the sessions within the curriculum would have been a premature. The results created by this study will help to establish if there is a permanent place for such sessions within our school curriculum.

4. FINDINGS AND ANALYSIS

4.1 ACADEMIC ASSESSMENT

I chose to use an arithmetic paper as tests with 'correct/ incorrect' answers have been shown to result in much higher levels of marker validity (Borsboom et al., 2009). Despite the children being Year 5 pupils, the test paper I provided them with is for Year 6 pupils. My decision to do this was due to the cohort being gifted children, who have higher than average attainment levels. Had I provided them with a Year 5 paper, a considerable number of the pupils would likely have scored 100% in the baseline assessment, meaning that I would have been unable to measure any academic progress.

A factor that it is important to make clear when considering the altered academic attainment of the pupils is that the implementation of my intervention programme cannot be linked in a simple causative way to increased academic attainment that the pupils displayed. Whilst a correlation between the two can be established this does not imply causation and a multitude of factors could have contributed to this (not least the ten weeks of lessons that pupils will have received between the beginning and the end of the intervention programme).

Table 1. The results of the participants in their baseline and end academic assessment (January 2019 and April 2019)

Pupil	Baseline Data	End Data	Gap
1	77.5%	92.5%	+ 15%
2	75%	100%	+ 25%
3	57.5%	87.5%	+ 30%
4	45%	87.5%	+ 42.5%
5	82.5%	87.5%	+ 5%
6	85%	92.5%	+ 7.5%
7	32.5%	62.5%	+ 30%
8	60%	100%	+ 40%
9	87.5%	92.5%	+ 5%
10	37.5%	47.5%	+ 10%
11	60%	80%	+ 20%
12	77.5%	100%	+ 22.5%
13	92.5%	100%	+ 7.5%
14	50%	75%	+ 25%
15	60%	87.5%	+ 27.5%
16	45%	82.5%	+ 37.5%
17	82.5%	87.5%	+ 5%

Source: own work

The table above demonstrates an improvement in the academic attainment of the participants within my study, and in some cases this improvement in substantial (e.g. in the case of pupils 4 and 8). As noted, I cannot claim causation of such improvements, however these results can assure leadership within my school and readers alike that the time taken out of lessons to participate within my intervention has not negatively impacted upon the learning of those involved.

4.2 WELLBEING RESULTS

The children were given a wellbeing questionnaire to complete, in which they had to RAG rate (red- quite anxious, amber- a little anxious, green- not at all anxious) how they felt in given situations, with the colours being coded to represent levels of anxiousness. They were allowed as much time as they wished to do this and the completed the exact same questionnaire at the end of the intervention programme.

When I individually analysed the results of the children at the end of the programme, no child had reported feeling any increase of anxiousness in any of the given situations:

- Completing a test at school
- Talking about secondary school
- Learning something totally new
- When I am struggling to understand something new in class
- Normal lessons
- Talking about my feelings

As can be seen below, overall a significant increase in wellbeing was reported across most areas, and all areas saw an increase as reported by the pupils in their questionnaires.

Overall, all pupils have showed wellbeing improvements and at the same time academic improvements. Whilst I cannot claim causation, this is nonetheless a significant finding (Fig. 1).

4.3. COMPLETING A TEST AT SCHOOL

During the wellbeing sessions, we discussed techniques for approaching tests, with the children sharing their thoughts and feelings verbally, and also making brief notes on sheets provided. The children identified that tests represented pressure for many of them, results which are in keeping with much reporting on the testing of

Figure 1. Charts A and B, depicting the baselines results of the wellbeing questionnaire and the end of intervention results

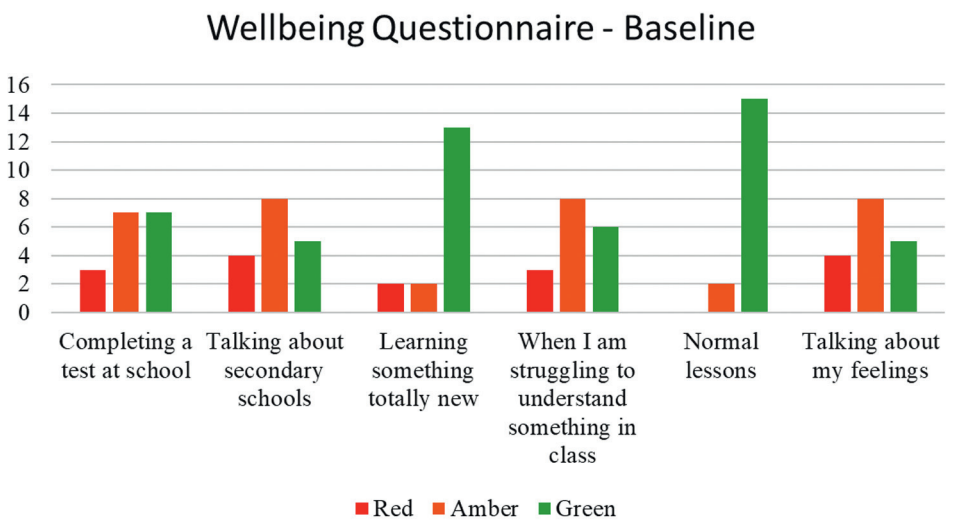


Chart A: Wellbeing Questionnaire – Baseline
Source: own work

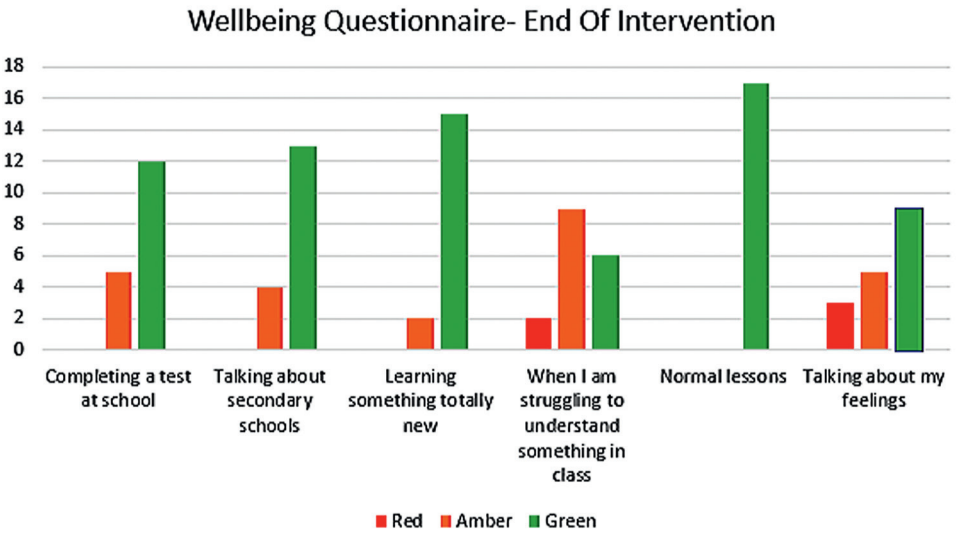
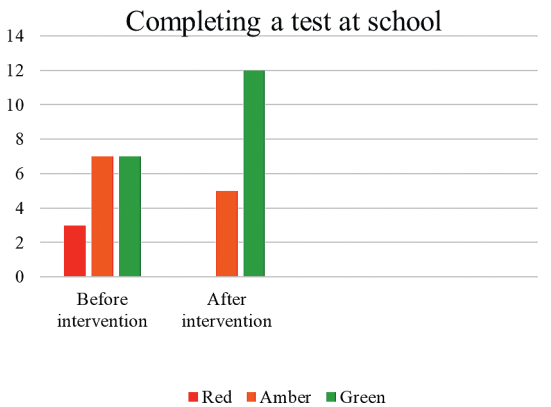


Chart B: Wellbeing Questionnaire – End of Intervention
Source: own work

Figure 2. Completing a test at school



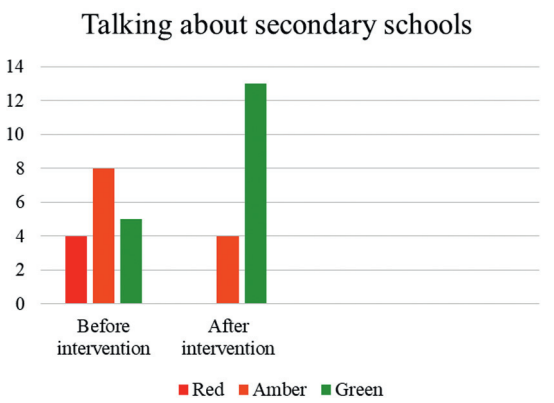
Source: own work

children (Wainer, 2013). The children identified techniques to support themselves which they also shared with each other, such as revision in advance of tests.

Whilst positive, the tests the children sat were formative and the children were aware of this, therefore it may be that they would feel differently were they sitting tests deemed 'important' such as their 11+ tests (formal tests which determine whether a child is eligible to attend a selective secondary school). Furthermore, much of the reporting on test related stress focuses on these 'high stakes' tests, rather than classroom level testing (Newton & Shaw, 2014).

4.4. TALKING ABOUT SECONDARY SCHOOLS

Figure 3. Talking about secondary schools



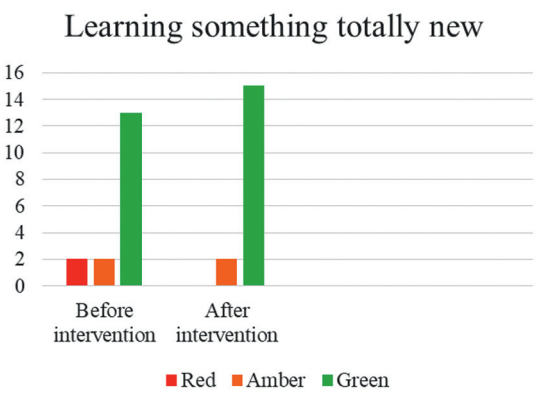
Source: own work

The reasoning behind the inclusion of this as a topic in the wellbeing questionnaire is the location of my school. My school is located in an area that means the most-able children can sit three different sets of 11+ tests (tests which deem if a child is considered able enough to attend academically selective secondary schools). This means that many able children in Year 5 will be being tutored and prepared for these tests, and none will know yet whether or not they will go to a Grammar School (academically selective school). These tests have been reported to be stressful, both by media sources (BBC, 2018) and in first hand conversations that I have had with pupils in my time as a classroom teacher.

The improvement demonstrated could be due to a range of factors, including but not limited to the intervention programme. In interview one participant responded to 'Is there anything you have found particularly helpful?' with 'It made me talk about things like grammar school more and that helped me worry about it less', suggesting that the intervention itself has had positive impact in this area. However, by the end of the intervention the 11+ application process had opened, meaning many participants now knew whether they would be taking the tests.

4.5 LEARNING SOMETHING TOTALLY NEW

Figure 4. Learning something totally new



Source: own work

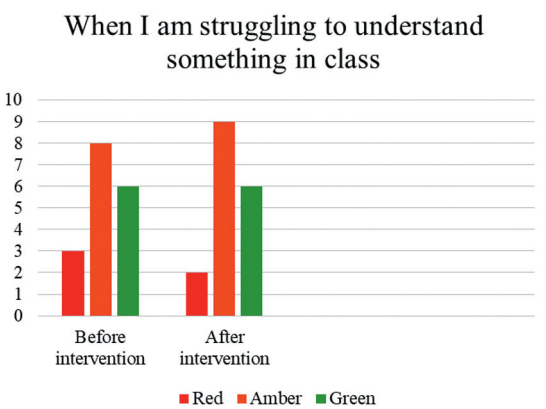
During the intervention programme the children had the opportunity to discuss with one another how they felt about new topics, soon realising that their experiences were similar. They then discussed how to alter their automatic reaction of feeling uncertain, saying that they could do research at home after the lesson and

perhaps learn from others who knew more than they did. They were given the opportunity to note down any ideas that they wished to take away from the session.

The area 'learning something totally new' was one that I selected for this study due to its link with Carol Dweck's 'growth mindset' (2012). Growth Mindset is the idea that students should be of the belief that their abilities can be furthered through continued hard work and self motivation, that their natural abilities represent a starting point and that they should be open to challenge and new material in order to effectively develop themselves. Dweck argued that the development of such a mindset would enable students to not see failures, but instead opportunities to stretch and further themselves (2012). Sagan (2015) questions the validity of this, arguing that many 'able' pupils are able to achieve enormously well without this mindset, and having seen some of my own pupils do so I can understand this line of argument. However, Hymer (2014, p. 5) points out that a growth mindset can encourage learners to take ownership of their learning and embrace challenge.

4.6 WHEN I AM STRUGGLING TO UNDERSTAND SOMETHING IN CLASS

Figure 5. When I am struggling to understand something in class



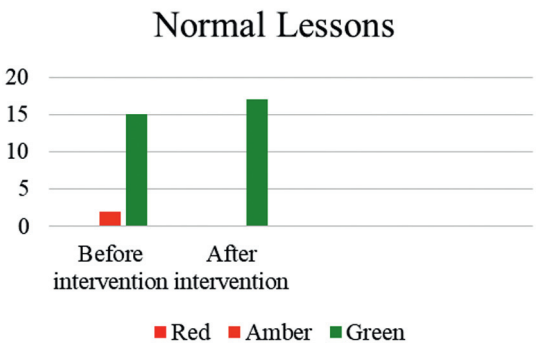
Source: own work

During the intervention programme, the children discussed how to approach situations when they felt challenged and shared their experiences with one another. Pupil voice would suggest that this was a successful approach as one student reported 'I worry less when I don't get [understand] something and remember the ideas we came up with for this'. I feel that this is a positive comment on the intervention programme, as the student is demonstrating a calmer approach to this situation and

the belief that they can still work to understand something, even if they are initially struggling with it. Scholars such as Smith (2005, p. 3) have argued that if children believe that intelligence is changeable then they are considerably more likely to believe it to be something that is within their control and can take ownership of, making them more positive when approached with new challenges and unfamiliar concepts.

4.7 NORMAL LESSONS

Figure 6. Normal Lessons



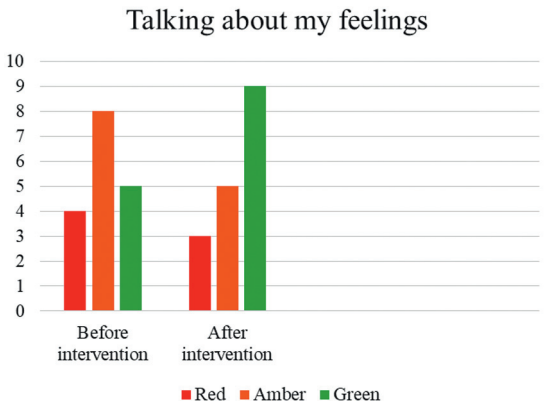
Source: own work

Due to the largely positive results in the baseline wellbeing questionnaire, normal lessons was not an area explicitly discussed within the intervention. Whilst not confirmed however, it is possible that participants may have considered other areas such as 'when I am struggling to understand something in class' as part of the experience that sometimes takes place in 'normal lessons'. Despite my lack of focus on this particular area when conducting my research and implementing my intervention, the participants end of intervention questionnaire did indicate a positive improvement within this area.

4.8 TALKING ABOUT MY FEELINGS

Whilst the intervention sessions did not explicitly discuss how the children felt about talking about their feelings, and how this could be improved, the sessions all involved talking about their feelings relating to different situations/ areas of learning and sharing these thoughts with other participants (where they chose to). The

Figure 7. Talking about my feelings



Source: own work

improvements demonstrated in the wellbeing questionnaire are further shown in interview transcripts, with one participant answering the question 'would you recommend these sessions to other learners?' with 'yeah I would because it helps them to express their feelings'.

4.9 INTERVIEWS

The interviews proved to be of great value when considering the insights of the participants, and excerpts from these have been used throughout this results section. A repeat of this study, would need invest more time in conducting interviews and perhaps conduct them with a greater degree of formality in order to gain a greater insight.

5. CONCLUSIONS

The perceptions of the participants regarding the wellbeing within this study would suggest that a wellbeing intervention, even a short one such as this, is of great benefit to the most-able children, as the results showed significant improvements in reported wellbeing of participants. This is a significant finding as researchers such as Neilhart and Betts (2010) have found that traits associated with poor wellbeing, such as low self-esteem, is a common characteristic amongst gifted children, and one that it linked to underachievement relative to their potential (National Commission on Excellence in Education, 1994). Furthermore, this study creates

a foundation for further research into wellbeing interventions and their impact, an impact which could also extend to those not labelled as 'most- able'.

The perceptions of the participants in this study support the value of a wellbeing intervention for the most-able pupils, as they self-reported improvements in their wellbeing following taking part in the intervention programme. The notion that a wellbeing intervention could be beneficial is one supported by academics such as Neilhart and Betts (2010) amongst other scholars who cite poor wellbeing amongst the most-able pupils. Therefore, the introduction of a wellbeing intervention for the most-able pupils can be considered a way to address these issues, and one that my participants have deemed to be effective.

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TRANSITION BETWEEN SCHOOLS: PERSONAL REFLECTIONS AND AN EVALUATION OF THE IMPACT OF AN INTERVENTION PROGRAMME

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Abstract

Potential problems that surround the transition from primary (students aged 4–11 in England) to secondary (those aged 12–16) school are acknowledged by practitioners, policy makers and theorists alike. However, an understanding of the feelings that arise in Year 6 pupils (10–11-year olds) during this change is not widely considered. The Transition Project, conducted in a town in the south of England in July 2017, was designed and delivered to help twenty-nine Year 6 children explore their own feelings, with the purpose of supporting and preparing this particular cohort for their transition to Year 7. It thereby recognised and recorded the impact of this project, the conflicting gamut of feelings and recognition of multiple emotions that can accompany this particular change curve. This chapter evaluates the project drawing lessons for all the teachers and leaders who prepare and receive children in moving schools.

Keywords: transition, emotions, social capital, intervention, autobiography

I. INTRODUCTION

1.1. THE ISSUE

The movement of some children from primary to secondary schools can add to other difficulties that they experience in the future stages of their education and lives (Watson, 2016). Supporting a child's Year 6/Year 7 transition can lower the

likelihood of serious problems such as avoiding school, falling behind with school work, becoming depressed or developing anxieties (McAra & McVie, 2013; Melrose, 2004). Research in such transitions shows that problems can spiral and grow, leading to negative peer associations, truancy, offending and dropping out of school (Bell, Hodgson, Pragnell, 1999). Starting secondary school with new responsibilities and independence can make children anxious, overwhelmed and exhausted (Evangelou et al., 2008). Successful and positive progression can also be achieved by children; however, transitions are more often fractured and can be further hindered by social circumstance or context (Melrose, 2004). Research evidence indicates that pupils from deprived backgrounds experience a more significant impact on their progress and motivation at this transition and transfer than their peers (Galton, Morrison & Pell, 1999; Galton et al., 2003).

Risk factors, such as truanting, aggression or poor choice of friends can become embedded and these additional, unpredictable and often chaotic factors become injurious to student and their educational attainment (Rice *et al.*, 2015). A heightened desire to belong to a social group occurs at this developmental stage; homophobia and relationship building become noticeable during transitional periods and children who share needs or life experiences tend to group together. It is at the point of transition that the consolidation of social identity occurs and negative associations may become established (Evangelou et al., 2008; Jackson & Warin, 2000).

Establishing reputations and becoming known for challenging behaviour can engender negative labels which remain throughout a child's school life (Becker, 1997; Webster, MacDonald & Simpson, 2006). Research provides other evidence of the intricacies experienced by children and researchers, such as Galton *et al.*, (1999), who highlight concerns regarding academic regression, which can occur during this transition and other authors regard this 'as the crucial time, when learners drop out or are made for life' (Williams, 2003, para. 1).

1.2. THE PURPOSE OF THE INTERVENTION PROJECT

The journey that we all undertake, moving from childhood to adulthood, is composed of various biological, cognitive and educational changes that, when prepared for and managed well, can build solid foundations for healthy physical and emotional development (Qualter *et al.*, 2007). Encouragingly, it has been found that children who adjust well during these transitional phases are shown to have enhanced feelings of self-worth amongst other positive and resilient characteristics (Merry, 2007).

It is therefore crucial to build a more nuanced understanding of the synergies that exist between the emotions surrounding this particular transition. The process of

change in age or stage can be influenced by negative and positive forces and factors; how children and youth are supported can be vital in determining behavioural and educational consequences (Lewin, 1952).

1.3. THE INTENTION

The intention of the project was to further understand, develop and implement support mechanisms for the children, families and their school, during this exciting but daunting transition period. The aim therefore, was to inform and equip children and their families with skills and tools that would reduce anxieties, build confidence and encourage resilience (Newman, 2004). It was hoped that these skills would enable them to make successful adjustments and to promote a firm foundation in Year 7. The programme cultivated links to, and explored opportunities in, the local community through the medium of art and drama; developing a sense of belonging and imparting transferable transition strategies, hopefully for life (Barry, 2010; Jack, 2000; Quinn, 2011).

As a practitioner working with young offenders, it was apparent to me that a common thread was emerging in their life stories; I would often be told by a child that 'it all went wrong when I left primary school'. Therefore, as a practitioner I decieded to investigate this area thoroughly.

2. SETTING THE SCENE: REVEALING THE AUTHOR'S PERSPECTIVE AND BIAS

'*We teach who we are*' (Henrikson & Mishra, 2015, p. 33) **But who am I?**

Whether we agree with Descartes' *Cogito ergo sum*, ('I think and therefore I am') (Descartes, 1637, p. 65), or with Nan Shepherd's opinion that we are less determined by how we think, as by how we walk, it is notable that both are in the present tense and therefore with no end point (Wright, 2017, p. 63). However, for the purposes of this chapter it is important to reflect on the beginning; the influences of education and culture on how I think and walk as an educator. I do not have terrible memories of my first experiences of school but I can recall a few dismissive and unfriendly teachers and the acute pain of failing a selection test, aged 10, and being labelled as one that would struggle in an academically focused school. Alongside a thousand other pupils, I was sent to a 'comprehensive' school for children who were deemed to be less suited to an academic approach to education than others. The photo below,

taken at age eleven, having already made a difficult transition to secondary school, sums up my Year 7 experiences and set the scene for the next five years. The photo was pasted into my Headmaster's scrap book and posted online recently; it chops my head off. I am in the row sitting on the beam and obviously the newspaper clipping was too long for the page and although I quite understand the practicality, it symbolises the feeling I had at age eleven perfectly. Not only that but also my name was spelt incorrectly, an error which was never rectified throughout my time at the secondary school.

This beheading and discombobulated start to my secondary education unfortunately pervaded not only my attempts at qualifications also but my self-esteem, leading me to a belief that I would always fail. Yet throughout my childhood, I had an urge to teach and from a young age would be happiest, alone in my bedroom, with my blackboard and imaginary class of children. This feeling of joy was evoked when I returned to education, aged thirty-eight to qualify to teach 16–18-year old students and the journey to rectify feelings of inadequacy began. This led to the opportunity to study with the Open University and a Foundation Degree in Youth Justice Studies was achieved. Even on my Graduation Day, I felt a fraud and yet University tutors encouraged me to jump to Masters level due to my consistently high grades. I applied for the part-time Masters in Education course and this was an exquisite, yet at times, uncomfortable, for the right reasons, learning experience; the highs and lows have opened and healed wounds from my school years. It was not until I came to analyse the project and write this chapter, that I realised the significance of why I feel so passionately about the transition from primary to secondary education. My own experiences had made me acutely sensitised to children, both verbalising or exhibiting emotions surrounding this transition and I had finely tuned a radar to collect narratives to support, investigate and unpick the changes that this age entails (Clough, 2002). The milieu of my own life and the heterogeneous collection of anecdotes and concerns, subconsciously impacted the creation and design of the project. This thinking reveals to me the importance of a writer to be honest and analytical about their position in relation to their writing. My experiences are the lens through which I evaluate the intervention project.

3. A BRIEF LITERATURE REVIEW OF TRANSITION

In the current global and educational climate of performativity, , it is not surprising that the period surrounding primary to secondary school transition can be extremely fraught.,. Examinations, assessments and new school destinations further exacerbate this pressure (West, Sweeting & Young, 2010).

Transitions feature in our everyday lives. Occurring daily in small, often unnoticeable ways as well as impacting social living in more significant and often dramatic events. Whether it is starting school, moving house or experiencing parental divorce, transitions all have to be faced, dealt with and managed, hopefully towards a best possible outcome (Coles, 1995). Theories of transitions have started to be voiced by modern sociological writers, in terms such as Bauman's *'liquid life'* (Ecclestone, 2010, p. 27) and it is more apparent that cultural and social pressures mean that we live an increasingly flexible existence; we are expected to change jobs and homes frequently and, in order to progress, these transitions have to be traversed.

Researchers, such as Melrose (2004) explain that children experiencing a *'fractured transition'* (Melrose, 2004 p. 331), meaning not managing, an often, complex transitional life event well, may carry a long-lasting effect that will influence how future transitions are managed. Criminologists have been more vehement, stating that unsuccessful early transitions can produce chaos in a child's life and increase the risk of falling into a criminal lifestyle (McAra & McVie, 2013; Rutter, 1996; Webster, MacDonald & Simpson, 2006). Therefore, educational transitions require support to ensure a positive outcome.

Policy makers, theorists and educational practitioners also recognise the importance of effective primary to secondary school transition, yet research seems to be lacking. Psychological research in this area, both in the United Kingdom (UK) and Europe also appears wanting, despite it being thought of as significantly important for every child (Sirsch, 2003). This complex life event, containing social and structural changes, has been considered from different perspectives and it is the aim of this review to critically appraise a wide-ranging selection of literature, in order to discuss possible application, create knowledge, understanding and promote action. It was important to include psychological as well as educational based literature, as the impact of life's transitions has many elements and consequences for an individual, their social capital and their part in community (Quinn, 2011).

4. RESEARCH METHODOLOGY

4.1. THE BROAD APPROACH

The focus of this research lent itself well to an interpretivist approach and a creative design. Situated Cognition, associating creativity, context and experiential learning were criticaldeciding the methodology required (Diske Hondzel & Hansen, 2015). This 'situatedness' provided a real-life example, for real world learning, not

only for the purposes of the research to be 'situated' in ways of concept and thinking, but also to effect change and promote well-being for the Year 6 group (Hart, 2016; Lewin, 1943; Schutz, 1967). Experiential learning gives all concerned the opportunity to share information and gain knowledge in a safe community (Lave and Wenger, 1991; Maslow, 1943). By actively learning and reflecting together, in order to make sense of the world and the personal situation of transition, enabled meaning-making, gathering and interpreting information and sparking creativity to deploy in other areas of life, when necessary.

This research does not make any claims that the feelings expressed by this cohort were effectively dealt with, or that they are a definitive list of the feelings surrounding transitions or that these children were supported more than in other Year 6 groups. It does claim however, to inform all concerned, about what is important regarding this particular phenomenon, how it can be experienced and that we should endeavour to better manage and support it. By adopting this phenomenological stance, it was anticipated that the very essence of the transitional experience could be captured (Hart, 2016).

To avoid the risk of researcher bias, a team of practitioners was recruited to deliver the majority of the project. Nevertheless, we should not ignore the role of the researcher and detachment is not a realistic expectation in qualitative research (Becker, 1967). This is a particularly valid point in a project such as this, where the researcher's sense of purpose and experience of transition became qualities that made the practice come alive. Hart puts this succinctly by stating that '*good research is often the outcome of a tenacious and motivated person, who has some experience of the problem they are investigating*' (Hart, 2016, p. 222).

4.2. MY ONTOLOGICAL AND EPISTEMOLOGICAL PERSPECTIVE

My own educational history and personal background have undoubtedly influenced my educational practice. I perceive the world to be an intricate network of systems, which interrelate and are dependent on each other. This ecological perspective convinces me that an intervention on one part of this network, for example society, will impact and affect another (Brofenbrenner, 1979; Jack, 2000). Creating an informal and safe learning community would improve not just my practice but the hopefully the practice of others (Lave & Wenger, 1991; Marsick & Watkins, 1999).

The project's aim to help each child symbolically construct an image of themselves, through which they can visualise walking into a new school and taking their place in the community, sits within Bruner's social constructivist's view of making sense of the world and themselves (Bruner, 1990). The assemblage of activities

and discussions involved conversations about their past primary school experiences and any sense of loss and grief felt at leaving this family-like environment; there was scrutiny of the very present changes involved in this transition and stimulated thoughts of future possibilities and opportunities.

It is important to remember the uniqueness of this cohort experiencing this transition, and methods of gaining understanding were therefore tailored to the particularity of the project, such as activities designed to promote dialogue and participation, which promoted valuable data capture via observation, photography and remembrance (Thomas, 2016).

The requirement for reliability, rigour and quality to underpin this research was not easy to ensure in such an unpredictable environment and using various creative methods. By researching the phenomena of transitions in such a way, it was hoped to discover what was really occurring (Hart, 2016).

A theoretical framework was necessary for the development of the research purpose and intention, plus the creation of suitable tools to generate evidence (Rose, 2007). This framework or paradigm, once ascertained, meant the project's activities and characteristics could be consistently positioned within it.

It became overwhelmingly apparent that the Constructivist/Social Constructivist theory met the requirements, the process, purpose and locus and became the dominant theoretical basis for the project. The works of Dewey, Vygotsky and Bruner promoted learning shared ways of understanding and talking about the world and this very much embodies the philosophy of this project (Bruner, 1977; Dewey, 1938; Illeris, 2009).

The Constructivist theoretical approach enabled major emphasis be put on the use of creative practice, whilst having conversations with the children (Bruner, 1990). Dialogic teaching methods employed a *'making-talking'* model and involved creative activities such as, drama, art, comic making and learning relaxation techniques (Alexander, 2017). This meant that through their own creativity, the children could interact with each other and with adults, encouraging the exploration of their feelings. This interaction enabled the children to construct their own meaning and understanding of the process of transition better; knowing why they felt like they did and that it was normal and acceptable to feel that way. They were encouraged to focus on the bigger picture of their future careers and, by imagining a social capital for themselves, develop a sense of belonging to the community in which they live (Bruner, 1990; Quinn, 2011).

As a researcher I was aware of other practitioner's and my own influence on the project and it is important for researchers to always honestly evaluate the impact that this can cause (Creswell, 2018). An example of this was evident in Session One,

when the children were told a truthful but potentially emotionally laden statement; that it had taken a year of preparation to design the project before coming to meet them and deliver the sessions; this had more of a resonance with the group than I had intended. They were perhaps affected by the amount of work I had done, from their perspective or by the emotional weight of the spoken words, as they referred to this, many times, in their post-project cards. The distinctions between acts, dialogue and emotion are not only blurred but affected by our own culture, social and economic status and educational history (Etherington, 2004). As researchers our first responsibility is to the people that we study and not to project's aims (Denzin, 1989). Our words and deeds need to be aligned with this obligation and what is heard and shared should be protected and respected.

4.3. DELIVERING THE PROJECT

The children's anxieties were described by the class teacher as being *'off the wall'* (angry and upset) after they had received their new school destinations in the Spring and tension, worries and fears were at the forefront of the children's minds when the project team arrived.

It was of paramount importance to the project that all the children in Year 6 be included and involved and not just those identified by school staff as being at risk or anxious. Children become adept at hiding their feelings and cannot always identify or express them. These are often the quieter, slightly withdrawn students, that slip through the net of attention. Without universality in this instance, the project would not have had a fair, diverse and fully inclusive sample group to observe and analyse, indeed it would not have generated such a broad, rich or meaningful data set (Creswell, 2018).

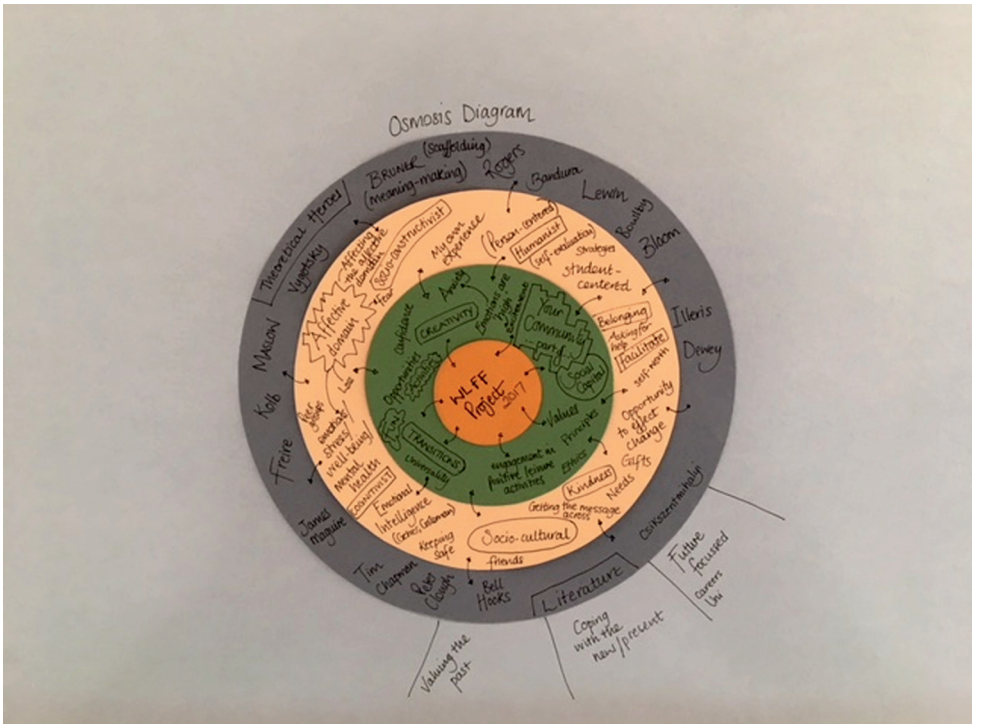
Numerous opportunities presented themselves to allay worries, dispel myths and to talk over problems that the students were struggling with. We were acutely aware as a team, that it was not ethical and nor was it the aim of the project, to gain information at the expense of others, especially un-consenting children. It was important to conduct a study that would leave a lasting impact by providing an experience that would benefit the lives of this cohort.

4.4. A HOST OF THEORISTS

To set the project in the context of theories that frame secondary school transitions, theoretical viewpoints and models, such as self-determination theory, enabling *'affiliation, growth, and engagement in community'* (Ryan & Deci, 2000, p. 75), were

included to help the children experience well-being (Maslow, 1943). As a researcher I felt cheered on by a host of theorists, by Maslow, Bruner and Bandura, amongst many others! It is their work and research that has blazed a trail for us to follow and to be incorporated into every aspect of our practice. Theories seeped into the session titles, the vocabulary used by those delivering sessions, the resources and the activities. Without these theoretical heroes, the research/project would have been hollow and just a fun week for the children. It was beneficial to analyse and read through the findings and to look back on how the practice illuminated the theory that initiated it; a full circle (Hart, 2016; Illeris, 2009; Thomas 2016).

Figure 1. Osmosis Diagram



Source: own work

By physically drawing the project in the middle of concentric circles with semi-permeable membranes, this positioned the project in, and connected it to, theory, domain, methodology and ethos. The use of Figure 1 as a visual prompt, helped the practitioners keep to the task and to design the different elements of the project.

The outer circle contains the theoretical heroes and researchers that sit on the scaffold and hold up the pillars of the project. Maslow, Kolb and Lewin, to name a few, have drip-fed their wisdom and opinions into every pore (Kolb, 1984; Maslow, 1943). The second circle is an assimilation of ideas found in the first, working with the affective domain and leading to the formation of practical and meaningful sessions. The last circle acknowledges the values, principles and creativity of the project and links into the initial question, purpose and intention; to allow the children to explore their feelings and prepare them for their transition to a new school.

Figure 2. Roots and Shoots Diagram

Source: own work

Figure 2 above illustrates the origin and connections of theories and concepts, as roots and shoots which developed the paradigm in which the project and its evaluation could abide. The growth above ground, of the tree, its leaves and fruit all symbolised what could come from the abundance of knowledge learnt and from the nourishment found underneath. For instance, the wealth of Humanism and of Social-Constructivism, of Maslow's whole person development and Bruner's purposeful and active learning concepts, feed directly into the values, sessions and narratives of the project and will hopefully produce fruit such as confidence and healthy transitional tools for life (Bruner, 1990; Maslow, 1943)

5. THE ANALYSIS

5.1. ANALYSIS OF RESEARCH METHODS

Whilst having already described the context in which the project is located and why such a study is deemed worthwhile, it is also important to clarify and justify the methods that were used when investigating and seeking answers to the research questions (Hart, 2016). The project sought to facilitate the exploration of feelings but, at the same time, needed to ensure that it did not raise anxieties or escalate negative emotions within the Year 6 group. This juxtaposition had to be finely balanced and every activity, worksheet or discussion topic had to include the methodological principles and reasoning; underpinned by evidence, theory and practice. These principles should not be compromised by functionality, by what would work best in the classroom or by what would be fun. This is where my educational studies and research experience became vital to the processes of the project's design.

The intervention, based on theory and literature, needed to be planned carefully and collaboratively, with a bespoke methodology and not delivered through a one-size fits all approach. The particularity of the methods chosen for the purpose of the project were therefore custom built and designed for this specific group of pupils; taking into consideration information gained from the class teacher, the pupils age, ability and learning difficulties. The chosen qualitative research methods of unstructured observations, field notes, dialogue and photographic evidence, were tailored according to the precise needs of those participating in the study (Creswell, 2018). This also included consideration of the practitioners and teaching staff although it primarily adopted a Humanistic child-centred approach (Maslow, 1943; Rogers, 1959). Using this model, genuinely listening and observing encounters, allowed the exploration of a *'meshwork of relations'* (Ingold, 2011 p. 81) beyond just usual

dialogue and transcription (Back, 2007; Chapman, 2000; Smith, 2016). This led to an awareness of how the mesh of myths, feelings and facts had been created and how they could be disassembled, plus an understanding of how they could be positively redrawn when the children were better informed (Ingold, 2011).

One aspect considered vitally important when planning the methodology and methods, was the making of direct links to the community. Sourcing funding and donations and an immersion in artistically inspired methods, all sought to build a sense of belonging in a creative town and to promote healthy social capital (Lawrence-Lightfoot & Hoffmann Davis, 1997). The rigour of this creative approach improved communication, with and among, the children and their voices were heard; an imperative for their transition journey. Despite the research risks taken, valuable insight has been gained into the often-mixed emotions, which has unlocked understanding and allowed these findings, such as they are, to bleed into future practice (Durrant & Holden, 2006).

5.2. PRE-PROJECT EMOTIONS CAPTURE

(See tables 1 & 2 below)

Since the intention and purpose of this research was to assess and support the gamut of feelings and emotions surrounding transition, consideration and time was given to how to capture these feelings in a safe and anonymous way. Methods had to be age appropriate, with little direction from the practitioner delivering the session and before any relational dynamics interfered with each child's genuine feelings.

Session One was carefully constructed to *'set the scene'* and create a platform for the rest of the sessions. After a brief introduction of who we were and with little discussion, the Emotions Capture activity was initiated; by requesting silence, a calm and reflective atmosphere was created in the classroom. This was followed by the more dynamic and upbeat presence of an experienced drama specialist, Lucy, who captured the attention and imagination of the children from the onset.

Before the children arrived, coloured and white paper was placed on each table with pens and a box was placed in the room that the children could post their *'feelings'* into. Brief instructions were given to write how they felt on the paper without discussion and in silence, they were told that more than one piece of paper/feeling could be posted. It was explained that this activity was confidential, that it was a safe space to be honest and to say exactly how they felt and that spelling did not matter. The children seemed to enjoy this time and a distinct and different atmosphere in the classroom was witnessed by the practitioners. A disruptive start to the session

had meant the children were excitable and the class teacher had explained beforehand that anxieties regarding the impending transition were *'high'* and *'extreme'*. This activity gave the children time to settle down, in order to focus and provided them with a vehicle to express their feelings, to acknowledge them through writing them down and to *'post'* them somewhere safely (Maslow, 1943). It was also hoped that they would recognise that the adults agreed that their transition was important, that they were supported in it, and listened to, regarding how they felt. After writing their feelings down, the children seemed very open to discussions about their fears or anxieties and not just about the facts, practicalities and logistics of changing schools. This also created a community of shared experience and made bonds between peers and practitioners; they were not alone, their feelings were valid and it was a safe environment (Lave & Wenger, 1991).

The results show that from the 112 emotion slips completed by 29 children, 66 were deemed as 'negative' feelings, 44 as 'positive' and 2 as unclear. The negative emotions, of being *'scared'*, *'nervous'*, *'sad'* and *'left out'* are a concern, however it should be remembered that a child may have written both negative and positive emotions on more than one slip of paper. A child may feel a range of emotions from *'Stressy'* to *'Excited'* or from *'Terrified'* to *'Joyful'*, all at the same time. Therefore, the evaluation of these emotions should be balanced with the strengths and limitations discussed later. It should also be recognised here that although some feelings are labelled as negative, this feeling may be constructive and induce positive change (Lewin, 1943).

Feeling excited and happy scored 14 and 13 respectively and were the highest scoring emotions, with scared and nervous scoring 9 each. This correlated to other research findings that not all children experience a difficult transition and it was a reminder to the team, not to presume that all in a Year 6 cohort will be struggling. However, it was a surprise that emotions such as *'Lonely'* and *'Alone'* were stated by seven children and that their vocabulary was at times articulate and stirring; *'mortified'*, *'help me'* and *'creative'* for example. These emotions were therefore further scrutinised and coded and four distinct themes emerged; apprehension, sadness, anger and anticipation. It is important to remember that although the children were asked to only write down their feelings about transition and not how they felt that day or minute, this cannot be guaranteed and they may actually reflect deeper emotions being experienced in their lives. All the children had visited their new schools the previous week for induction days and therefore some of the emotions expressed may be connected to that experience; such as *'Angry – I missed the bus'*, *'Awkward because I knew a person who came round a lot of times'* and the very optimistic statement of, *'Finally home! Excited, happy, part of something, special, popular because I knew loads'*.

The weather was hot, the children had just finished their lunch break and then a fire alarm caused a 20-minute delay to the first session, with the children having to sit outside in the playground in the heat. This was reflected in some of the words chosen to represent their feelings, *'sweaty'*, *'sleepy'* and perhaps the rather ambiguous words, *'sick'* and *'mad'*, could relate to how the children felt at that moment, in that environment.

It was intended that this activity would be replicated after the project was completed and the class teacher was asked to do this on the day after the session completed. This method was chosen in order to limit any influence the practitioners would have and any pressure the children might feel to write only positive feelings down. In hindsight the project team should have explained this fully to the class teacher, who changed the activity to *'thank you'* card making and the opportunity for comparable results was lost. However, the cards provided other rich data and became valuable to the project's findings.

Table 1. Pre-project Emotions Capture – expressed by the Year 6 cohort at the beginning of Session One

Emotion		Emotion	
Scared	9	Excited	11
Nervous	8	Happy	10
Shy	7	Good	3
Worried	5	Awesome	2
Sad	5	**Awesome**, great, fearless	1
Apprehensive	4	Very **happy**	1
Weird	2	**Happy** because my **friends** in year 7	1
Terrified	2	I wasn't that scared because I've made lots of **friends**	1
Annoyed	2	Joyful	1
Little bit **Nervous**	1	Loving it	1
Lonely, **upset**, stupid, **sad**	1	**Good** mood	1
Unhappy, **lonely**, lonely, lonely, lonely	1	**Worried**, **excited**	1
Lonely	1	**Excited** and **worried** same time	1
Left out, Alone	1	Finally home! **Excited**, **happy**, part of something, special, popular because I knew loads	1
Left out	1	Finally	1
Left out, different, kinda fun	1	Educated	1
Unhappy	1	Never give up!	1

Little bit **angry**	1	Cool	1
Angry – I missed the bus	1	Curious	1
Upset	1	Creative	1
Help me	1	Surprised	1
Don't want to	1	Amazed	1
Shocked	1	Mad *(dual meaning)*	1
Stressy	1	Sick *(dual meaning)*	1
Tough changes	1		
Bored – a bit	1		
Awkward because I knew a person who came round a lot of times	1		
Mortified	1		
Sweaty	1		
Cold	1		
Sleepy	1		
	66		
Total number of emotion slips completed	112		
Number of students	29		

Source: own work

Table 2. Emotions scoring higher than 1

'Negative' Emotion		'Positive' Emotion	
Scared	9	Excited	14
Nervous	9	Happy	13
Shy	7	Good	4
Worried	7	Awesome	3
Sad	6	Friends	2
Apprehensive	4		
Lonely (Alone)	4		
Left out	3		
Weird	2		
Terrified	2		
Annoyed	2		
Upset	2		
Unhappy	2		
Angry	2		
Totals	61		36

Source: own work

Categories

Emotion		Emotion	
Scared	9	Excited	14
Nervous	9	Happy	13
Shy	7	Good	4
Worried	7	Awesome	3
Apprehensive	4	Friends	2
Terrified	2		
Weird	2		
Sad	6		
Upset	2		
Unhappy	2		
Lonely (Alone)	4		
Left out	3		
Annoyed	2		
Angry	2		
Totals	61		36

Themes

- **Apprehension** – scared, nervous, worried, weird
- **Sadness** – sad, upset, unhappy, lonely, left out
- **Anger** – angry, annoyed
- **Anticipation** – excited, happy, good, awesome
- **Friends**

Source: own work

5.3. POST-PROJECT CARDS

(See tables 3 and chart below)

As previously mentioned, these cards were an unexpected source of data and although they could not be compared with the pre-project emotions capture, it has been of use. Initially, it was a disappointment to receive thank you style cards, as it was felt that the children may have been told to write them, may have copied each other or that they had been pressurised to create them in a prescribed style. However, on inspection, the words and drawings were very personalised and individual, they had deeper meaning than expected and were full of messages reflecting how the children felt and what was important to them.

The words on the cards were coded and as a result, three themes emerged which have provided vital evidence for this evaluation; *Appreciation, Impact/Support and Fun*. This proved that not only had the project impacted their emotions, it had also given the children a sense of being supported and that they had enjoyed the experience. The balance of these themes was interesting, with Appreciation and Impact/Support scoring higher than Fun. This was gratifying, as although it was hoped to give the children a good experience, the project was not based on providing just a week of fun activities. The sessions delivered educational and carefully created

activities that were designed to prepare, support and allow for the articulation of feelings in a safe space; the post-project cards analysis underlined the success of delivering these aims. Consideration of these findings enabled links to be made back to the methodological and theoretical foundations of the project. The Social Constructivist approach of creating meaning from the experience of each element and activity was achieved and the evidence that the children appreciated these, were impacted and felt supported and that they enjoyed the creativity was very satisfying. Further analysis of these findings can be found in the following sections (Bruner, 1990; Csikszentmihalyi & Schneider, 2000).

Table 3. An evaluation of cards received from the Year 6 cohort at the end of the Project

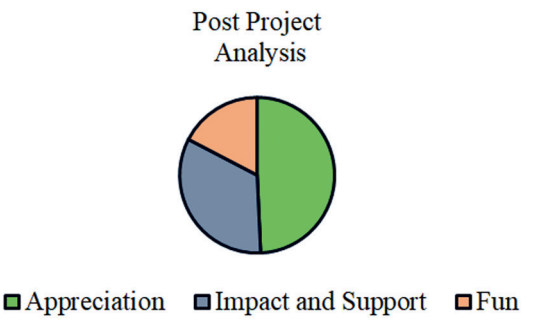
Coded Words	Instances
Thank you	21
Preparation/hard work done for us	8
Fun	7
Boxes/gifts	6
Helped me	5
Smile	3
Amazing	3
Hope to see you again in secondary school	3
Appreciate	2
Not forget you	2
Advice	2
Amusing	1
Feel less nervous	1
Drawing in comic session the best	1
Relax kids session the best	1
Special	1
Impressive	1
Delight	1
Number of cards received	23

Source: own work

Diagram 1: Themes	Instances
Appreciation	34
Impact and Support	23
Fun	12

Source: own work

Diagram 1. Post Project Analysis



Source: own work

5.4. REMEMBRANCE – ONE YEAR ON

Whilst working for a University's Outreach Team, at a local secondary school's Futures Fair in July 2018, I was delighted to be recognised and spoken to by some of the Year 6 cohort from the Project. These students had just completed Year 7 in a large Academy; it was the ideal time to catch-up with them and ask about their first year in secondary school. Some of our conversations are outlined below and include my own comments, in italics and a different font. I had not expected such an enthusiastic response and it has provided encouragement and a validating endorsement of the project's intentions.

Student A approached full of smiles and asking questions about University and the Art-based subjects that could be studied. He then recognised me and more smiles ensued. He proceeded to tell me how happy he is at school and loving Art lessons especially. We talked about the project and the aspects that he had found helpful, especially the art-based activities and he particularly mentioned the pyramid making activity for the framed art work and the comic making. Another aspect A spoke about was that during the project he remembered discussing the importance of making good friendships and not getting involved with the wrong group.

Food had been a concern for A and he mentioned to a practitioner that he thought that his free school lunch would not be available at secondary school. This was discussed with the teacher and then with him discretely and he remembered this and was pleased to report that the food was great in Year 7! A had seemed vulnerable and physically small for his age in Year 6 and English was not his birth language, however it was encouraging to observe how confident, settled and positive A seemed at the end of Year 7. I was also pleased to note how ambitious A was regarding Higher Education and a career in Art.

Student B recognised me from a distance, at the event and brought her group of friends over to the University stand. She happily announced to her friends who I was and how she had loved her gift box. I asked her how she had found Year 7 and she went on to tell me how settled she was a school now and how after an uncertain start had made some good friends. B and her group of friends were asking direct questions about University and degrees that could be studied. They also wanted to tell me about the canteen system and how good the food was. *B was very optimistic about Year 7, her education and about her future; this was a pleasant surprise for me, as she was a student who I had thought may find secondary school a challenge. My concern was instinctive and influenced by the fact that she had exhibited low literacy skills and knew older friends who had dropped out of school. B was a member of the class who was always seeking affirmation and attention from the practitioners and school staff and was prone to misbehaving if this was not forthcoming. I had been concerned that her behaviour would not be managed well in the secondary school environment, where she would have different teachers for each subject and that she would look to her peers to fulfil her needs.*

Student C remembered me and when I enquired how she was getting on in Year 7, she was pleased to tell me about her progress and that she was top of her class in every subject. C was very proud to achieve this as she was being tested for dyslexia and was emphatic about how her new school were helping with this. C had a very determined opinion on the purpose of school and a focus on her progression to Higher Education. She also told me that she had made good friends straightaway. *I remembered that she had previously told me in Year 6 that she worried about making friends as she finds maintaining relationships a challenge. It had been a concern that C had exhibited behaviour usually found within Autistic Spectrum Disorder during our time together in Year 6 and it was heartening to know that the school were supporting her education and that she was achieving academically.*

Student D approached me full of confidence and eager to tell me about his career and educational aspirations. He also wanted to give me details of how he walked to school, enjoyed the school canteen and the social interaction. D is Romanian and had worried about making friends and being bullied in Year 7. However, he had stated that he felt safe, had made excellent friendship choices and was *'loving'*

school. He talked about how discussing friendships and meeting new people during the project had helped him. *D's lack of confidence had been apparent during the project week and despite his excellent command of English, he seemed reluctant to communicate unless prompted. It was therefore exceptionally gratifying to see how effervescently he spoke about his Year 7 experiences and feelings.*

Student E was very pleased to see me and to recall the project. He told me about how he had taken up some of the opportunities on offer through the vouchers in the project gift box; especially being given free art equipment and an ice cream. He was keen to tell me that his new school was good, including the food and that he still had an ambition to be a zoo keeper. *During the project, when we were discussing career aspirations and the purpose of school, E had told me then, that he wanted to be a zoo keeper and that I would have a free ticket to his zoo, for life! The class teacher had warned me that E's behaviour was immature and challenging at times but this had not presented itself unduly during the project and I was pleased that he was enjoying the fresh start of Year 7.*

Student F came over and stood quietly by my side. When I spoke to her and asked about her Year 7 experiences, she told me that school was *'getting better'* after an unsettled start and that she had found it difficult to adjust from Primary school. She also disclosed that this year had been particularly hard due to family problems. I was able to encourage her and she was keen to introduce me to her new friends. She reminded me that I had known how to pronounce her name and that had meant a lot to her. *The importance of the adult-child relationship was apparent working with F on the project and again during this subsequent meeting. F was shy about her cultural identity and the country of her birth, Lithuania and this seemed to inhibit her confidence. I was thankful that she had a group of friends around her who she seemed confident and comfortable with.*

5.6. ANALYSIS – ONE YEAR ON

The main themes in the conversations at this event echoed those found in the project: aspirations, friendships, confidence and feeling safe, with all of the students being effusive about their experience of Year 7 and readily expressing their feelings (Coffey, 2013; Symonds, 2015). Many of the students told me about the environmental aspects of school and that the food was great and they remembered discussing the difference in eating lunch and having break-times at secondary school during the project; for future projects it will be important to place an even greater emphasis on these elements. Additional planning, ethical consideration and importance should be given to the adult-child relationships that were evident in the words, body language, familiarity and disclosures demonstrated in these conversations. Emotions

surrounding feeling safe and the very basic appreciation that the food was good was apparent and interwoven in their comments and yet ambitious objectives were also included. These aspects correlated to Maslow's hierarchy and it demonstrated an understanding of the purpose of school as a key to open the doors to fulfilling careers and futures (Maslow, 1943).

Overall, it was encouraging to hear how the students treasured their gift boxes, had kept them and had enjoyed the contents and tried new opportunities. They all seemed very confident to discuss the project and Year 7 experiences in front of their friends and it was heartening to receive such warm greetings from these students. They told me personal things about their lives as though I was an old friend and did so with big smiles and laughter. As had been the intention from the start, the project activities had left a lasting impression on them (Marsick & Watkins, 2001).

It is of course difficult to determine the effects of the project from such brief conversations, and it is impossible to separate the projects results from the Primary School's own preparation for the transition and of the Secondary School input in receiving these students into Year 7. Personalities, family support and maturity will also have played a part in the successful transitions of this particular group. However, it was pertinent that members of their community had left such a profound impression on ten and eleven-year-old children and this should not be underestimated. It was evident that they had felt valued, were grateful for the kindness shown and that the activities and their meanings had supported their transitions.

SOCIAL CAPITAL AND BELONGING

Social environments, family relationships and belonging to a community or group are all recognised as supportive protective factors for children (Bronfenbrenner, 1979; Lave & Wenger, 1991; Rogoff & Gardner, 1984). However, it should be remembered that these same factors can also cause problems, often experienced by already disadvantaged and labelled young people (Chapman, 2000; Galton et al., 2003; Pincus & Minahan, 1973). This tension can inhibit or enhance the development of social capital, it can crush or build a sense of emotional wellbeing and either reduce or produce pride in a community (Quinn, 2011). Yet children learn from relationships with different people, from issues and challenges; through them vital resilience is often developed (Lewin, 1943). Bronfenbrenner's ecological systems theory provides us with a framework to examine how humans create the environments in which they live, develop and behave (Bronfenbrenner, 1979). The symbiotic relationships and interdependent nature of this theory became an important

component of the project; that the society in which each child lives, is interested in their future, thus signifying their importance and function within it (Jack, 2006; Pincus & Minahan, 1973). The micro to macro-level vision of the importance of assisting every child to develop their initiative and full potential during this transition, in order to mature, explore future possibilities and thereby contribute to their community, was dripped into the minutiae of the devised curriculum (Maslow, 1943; Craft et al., 2002).

The assemblage of elements found in this rich environment, enabled the process of fitting together or organising data or complex systems of texts and qualities, to begin (Livesey, 2010). This then shaped the coming together of the project and through mapping the different connections in play, any *'paradoxical forces at work'* were uncovered (Deleuze & Guattari, 2004; Smith, 2016).

RELATIONSHIPS AND FRIENDSHIPS

'Whilst transition may be fraught, a focus on the relational aspects of the process can help to ameliorate many of the challenges presented during this change' (Coffey, 2013, p. 1)

Throughout the project, conversations regarding relationships and the losing and making new friends were very prevalent; the children also thought it important to talk about this when I met them one year on (Symonds, 2015). Concerns about school work and homework were less pronounced than the children's anxieties surrounding new peer associations and social worries, such as lunch and break time. Despite their earlier worries about friends, those I met with, post-transition, had established themselves in good peer groups, were coping with the larger school environment, changing classrooms during the day and were even managing the previously dreaded independent journey to school.

What stood out during the project, and when meeting with some of the children again, was the importance of the child/adult relationship. This was another unexpected finding; by showing empathy with the children, perhaps at a vulnerable time in their lives, the practitioner had become a significant adult. This adult took an interest and allowed the children to express their feelings and thus validated their emotional position. It had meant a great deal to them that it had taken a year to prepare the project and perhaps this cemented a solid and professional relationship, at a time in their development when friendships are important (Symonds, 2015). Within this particular demographic were children who experienced a lack of parental interest or input and the bond of friendship may have been heightened by

the child's need to be thought of as significant by an adult. The protective factor of being thought important by a stable and consistent adult has long been researched and it became apparent that the practitioners were regarded as role models, mentors or *confidents* by the children (Farrington, Ttofi & Piquero, 2016; Jack, 2000; Webster, Macdonald & Simpson, 2006). The responsibility of pro-social modelling, showing kindness and concern produced a connection that the children thought important, although a thorough awareness of this was not apparent until the post-project analysis and remembrance took place.

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CAREERS EDUCATION: THE IMPORTANCE OF STUDENT VOICE

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Abstract

This chapter seeks to establish how the motivations of those involved in the delivery of careers education influence it. The research took place at the school in which I work and uses an appreciative inquiry approach into the motivations of those involved in the teaching of careers education, the success of the school based on external accountability measures, and the perspective of the students. The results of this research suggest that there is a significant contrast between external analysis of the school's careers provision and student evaluation of it. The chapter concludes with three recommendations of next steps for the school in order to better impact student confidence and aspiration by building on the use of student voice in developing careers education strategy. These recommendations are worthy of all schools that teach careers education to consider.

Keywords: careers education, motivations, student voice, aspirations, confidence

1. INTRODUCTION

In 2018, the head teacher of School X in England shared the School Development Plan for the following academic year. This highlighted a gap in the careers education provision for Sixth Form students: those aged 16–18 years. Having worked in the school as a teacher for three years, I was asked to develop a strategy to fill this gap. School X has 1400 students, with 150 in the Sixth Form, and is situated in

south-east England in a coastal area with high levels of socio-economic deprivation. The Sixth Form has a focus on vocational rather than academic courses, and is in competition for students with other neighbouring providers.

Beyond the school, change was also afoot in relation to careers education. In 2017 the government published a new careers strategy, which was then enforced by statutory guidance in 2018. This guidance details the requirements of a school's career provision through the obligation to meet eight benchmarks:

- A stable careers programme.
- Learning from career and labour market information.
- Addressing the needs of each pupil.
- Linking curriculum learning to careers.
- Encounters with employers and employees.
- Experiences of workplaces.
- Encounters with further and higher education.
- Personal guidance.

School X may be at risk of failing to meet its obligations under this new strategy due to the gap in the Sixth Form career strategy, as highlighted in the School Development Plan. As part of my role, I had to ensure that the strategy for Sixth Form accounted for, and had the ability to meet, the benchmark requirements. This was of particular importance, given that at this point the school was due an Ofsted inspection (which is the primary means through which accountability for meeting these obligations is established).

2.1 THE INFLUENCE OF POLICY ON LEADERSHIP

School aims and objectives, and the visions which drive change in schools, are strongly influenced by external factors. One of the key influences is Government strategy and policy; as national priorities change, schools are the main object of implementation. Much of the language used by politicians and bureaucrats is transformational, making reference to strong moral purposes. The introduction of legal obligations and formal accountability procedures means that the introduction of new policy is in fact a much more transactional process. Ball et al (2012) explore the process of policy implementation in schools and discuss the nuanced process of 'doing policy', suggesting that there is more going on than simply putting a premade formula into action in a school. They suggest that while a policy is written by

Government, it comes to life when it reaches a school. The process of implementing a policy requires change in a school. This is what makes the final product of a policy unique to the school in which it is implemented, as every school will act and react differently to this change.

2.2 UNDERSTANDING CAREERS GUIDANCE AS A POLITICAL ACT

The act of providing for careers guidance is political (Watts, 1996). To assess the success of a careers guidance strategy, the political objective of the strategy should be considered. However, much of the critique of careers strategies comes from judgement against different political objectives. This is why despite a consistent stream of criticism directed at careers guidance strategies in England, conclusions about the weaknesses of the strategies vary considerably.

Watts (1996) identifies four philosophies which underpin the approaches to careers education.

Table 1. Four philosophies which underpin the approaches to careers education

	Focus on society	**Focus on the individual**
Change	Radical (social change)	Progressive (individual change)
Status quo	Conservative (social control)	Liberal (non-directive)

Source: Watts, AG (1996) 'Socio-political ideologies in guidance' in AG Watts , B Law, J Killeen, JM

Hooley (2009) summarises each of these ideologies as follows:

'**Liberal**: Guidance that is focused on the individual and pursues a non-directive approach. Individuals are supported to make decisions, but their decision making is not challenged.

Conservative: Guidance that serves the current needs of society e.g. matching the labour force to capital needs. The process of guidance is about steering people into places that they can be socially and economically useful.

Progressive: Guidance that encourages and supports individuals to exceed the role that they and those around them might have imagined. This might involve challenging their sense of what they are good at or fit for.

Radical: Guidance that encourages individuals to challenge the social and economic conditions that are constraining their choice. This might move people beyond

thinking about what they can do and get them thinking about why they and those like them can't do other things.'

By understanding the philosophies which motivate us when we are involved with careers work, we can clearly articulate the purpose of our approach and communicate this to stakeholder, clients and working partners (Law, 2011). To support this understanding, Law has developed a reflective tool which guides people to identify their philosophical orientation. This type of understanding can also be used to inform critique of careers policy and strategy at Government level.

3. METHODOLOGY

To gather the broadest possible picture of the position of the students, the school, and the motivations of staff, I used mixed method research. My methods involved a combination of:

- a student questionnaire that was analysed quantitatively,
- qualitative responses to a change framework outlining the key features of effective change,
- documentary evidence of school inspections, and
- Law's (2011) reflection tool to establish the underpinning motivations and philosophy of those involved in careers leadership within the school.

When analysing the responses to each of these forms of research, I took an appreciative enquiry approach. The process seeks to apprehend, appreciate and heighten the positive potential of an organisation or system (Cooperrider & Whitney, 2001). The foundations of appreciative inquiry differ to those of other forms of action research, which tend to take a problem-orientated approach. Cooperrider and Whitney suggest this can lead to an over focus on the weaknesses and negatives of an organisation, and easily lead to a degenerative view of the organisation. Appreciative inquiry on the other hand, focuses on what is possible rather than what is wrong. Rather than limiting study solely to the positive, Bushe (2007) suggests that in its most effective form, appreciative inquiry seeks to identify features which can be used positively in the future. To do this I used the following structure:

1. Appreciating – valuing the best of what there is.
2. Envisioning – what might be?
3. Dialoguing – what should be?
4. Innovating – what will be?

4. ANALYSIS AND FINDINGS

The findings of each of the four aspects of the research are outlined below.

4.1 STUDENT QUESTIONNAIRE

The results of the questionnaire showed that around 50% of students felt they knew where to find the information they needed to understand their next steps. However, they did not feel that school would properly prepare them (45/66 respondents disagreed with the statement) and they did not feel motivated to start working towards these next steps (55/66 respondents disagreed with the statement). In fact, 56/66 of respondents did not believe it was their responsibility to do so. This could be interpreted as a reflection of the students' disengagement, or perhaps disenchantment with their futures and a lack of aspiration. A cynic might argue that if the students themselves do not care, why should we? Of course, this is where the motivations of the school become so relevant. The motivations of the school will determine whether or not these students will receive the support for which they feel the school is responsible.

4.2 CHANGE FRAMEWORK

In response to the change framework, staff were able to identify evidence of the presence of each of the factors required for effective change. Reference was made to a clear leadership structure, as well as both internal and external sources of evaluation available to assess impact, such as monitoring and OFSTED.

The presence of a shared moral purpose underpins the success of a transformational leader and is a vital factor in successful change (Avolio, 1999). Staff identified the school vision as the moral purpose of careers work in school, but then suggested that some staff may not have 'grasped' the school's vision and moral purpose and would be resistant to change. This vision has been distributed and displayed around the school, and staff were involved when it was developed. It may be more accurate to suggest that what has not been 'grasped' is an understanding of how the school vision relates to careers work. Developing this understanding would provide the opportunity for sharing and refining the moral purpose as more stakeholders become involved and aware. It may also inspire motivation and enthusiasm, as it will increase people's understanding of the purpose of their work which in itself can increase motivation to succeed (Begley, 2010).

What appeared initially to be a negative issue of potential disengagement among staff can instead be understood as a lack of understanding, which gives rise to an

opportunity to motivate and encourage buy-in (Hayes, 2011). Taking the opportunity to define the vision to give careers specific dimensions will also help to clarify how the vision is to be achieved.

4.3 DOCUMENTARY EVIDENCE

Documentary evidence overwhelmingly supported Hooley's (2018) assertion that schools in disadvantaged areas offer above average careers provision. The 2019 school inspection report made specific reference to the quality of advice provided to students. Analysis of the achievement of the benchmarks for careers found six out of the eight benchmarks to be over 75% complete and only one currently below 50% achieved – significantly above average at this stage of implementation.

4.4 REFLECTION TOOL

It is interesting to note that respondents completing the change framework described the school vision as their moral purpose rather than their own motivations and underpinning philosophy. Comparing the responses to the change framework with those from the reflective tool provided a much broader insight into the personal and organisational motivations.

All the members of the careers team, myself and the head teacher returned results suggesting a 'power' philosophy to careers guidance. The 'power' philosophy is 'focused on choice of employment, firmly based on policy requirements, with expertly assessed achievement for a competitive economy' (Law, 2011). This is clearly demonstrated in the school's current approach, as the emphasis of funding is on providing careers advice from an independent source and the school's new strategic hierarchy was adapted in response to the new Government strategy.

This position is on the face of it primarily conservative, however it has the scope to be liberal or even radical depending on the freedom attributed to the external advisor. It is understandable that those in strategic roles within careers work take this position because it gives the greatest weight to their role. It is the role of those in strategic positions to ensure the implementation of the policy. Further to this, it is these people who are accountable for school data, including figures relating to students who do not progress into employment, further education or training. As Targett (2013) suggests however, these concerns should not be allowed to compromise the impartiality of a careers advisor. If the advisor is not compromised, the students will benefit from whatever motivation serves their advisor and from the driving forces within the school.

5. CONCLUSIONS

Overall evidence suggests that the school is meeting its statutory obligations and that the advice given to students is of high quality. Despite the background of policy change and in contrast to other schools, the provision in place is comprehensive and comparatively well-funded. Furthermore, it is evident that those at senior leadership level within the school have clear motivation for what they seek to achieve through careers education. However, there is a significant contrast between external analysis of the school careers provision, and students' evaluation of it. The gap identified in the School Development Plan in terms of provision and staffing is no longer a concern in terms of external accountability. However, if the information and education students are given is not being used, it will not impact their careers and outcomes and the moral purpose of the process will not be achieved.

The school is in effect going through the motions of providing careers education, and comprehensively so, but the results of this are not translating into an impact on student confidence and aspiration. The primary weakness Law (2011) attributes to a power philosophy is a tendency to overestimate the capability of policy. Driven by a power philosophy among leadership, the school is implementing policy effectively, however, the policy based accountability measures are failing to measure and take into account the position of the students. This is why the disconnect has not been identified until now.

Interestingly, some research carried out by myself into motivating staff to support leadership may go some way to explaining the reason for this disconnect from a student's perspective. Applying Maslow's Hierarchy of Need (1943), career aspiration and confidence would fall into the category of esteem. It could be suggested that part of the problem faced is that students' lower needs are not being met, given the lack of confidence expressed in the student's questionnaire responses.

Envisioning an ideal situation, there would be a cross-school strategy to ensure these needs are met in order for students to access the full benefit of the careers provision offered by the school. From a statutory perspective, considering what is required of the school, there are only certain needs within the hierarchy for which the school is considered responsible. Realistically, there is scope for some of these needs to be met within the framework that we are operating. By improving the strength of careers information within lessons and securing links in their understanding between their chosen subjects and available progression routes, students' confidence in their own achievements will grow, which supports their lower level needs and allows them to open higher level needs.

Envisioning the ideal scenario for careers within the school, it would be good to see an inherent interest and motivation among students, with students actively engaging with the material and provision offered to them and appreciating its importance and benefit to them. Whilst the circumstances each school is presented with in terms of the cultures and external motivations of students are very different, the statutory requirements do not vary across the country. Change needs to engage with these contrasts, the specificities of our locality, and the impact of this on our students.

6. RECOMMENDATIONS

Three recommendations for the school to move forward with careers education, with respect to improving student understanding and aspiration, are proposed:

1. The careers teaching team, working in a manner that engages the other staff stakeholders, needs to refine the application of the school vision to its work.

This process of sharing and building a vision will engage all those involved and provide the vital foundations for transformational leadership and change.

2. Periodic review of student understanding and aspiration needs to be established.

Only through the gathering of student perceptions can the impact of careers provision from their perspective be understood and the overdependence on statutory and policy based assessment be overcome. Students should be invited during this process to suggest ways in which they feel they could best be supported, as this may provide some 'easy wins' for their engagement. This information should then be used to keep track of the presence of the current disconnect and to direct priorities for careers strategy in order to ensure that student's social and emotional needs are being met.

3. Attention needs to be paid to the specific needs of our demographic of students in order to successfully tailor their careers experiences and understanding to their needs.

Literature surrounding the needs of disadvantaged students should be a central focus of all careers strategy. In effect, a disadvantaged student strategy for careers

provision needs to be established. The successful achievement of the majority of the benchmarks should give the school confidence to build on what is in place and 'put its own stamp' on the implementation of policy. As Ball et al (2012) suggest, the policy can now be made unique to the school.

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AN INVESTIGATION INTO PERCEPTIONS OF THE EFFECTS OF LEADERSHIP ON PUPIL BEHAVIOUR IN A SWEDISH MIDDLE SCHOOL

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Abstract

This chapter investigates the perceived effects of school leadership on pupil behaviour in a Swedish state middle school in which up to half of all teaching is carried out in English. Through a staff survey and interviews, alongside student surveys and focus groups, it focuses on insights and perceptions around behaviour, the effectiveness of behaviour management systems at the school and the contribution of leadership to these systems. It revealed that although staff felt supported and had a great deal of trust in the leadership of the school, there remained some confusion around the vision behind the behaviour management policy. The chapter concludes that clarity, trust and communication are key in implementing change within a school. There are implications for all schools in differing contexts.

Keywords: Sweden, behaviour, leadership, trust, vision

1. INTRODUCTION

A recent English government report shows behaviour management in the classroom influences "motivation, safety, engagement, mental health and enjoyment of education" (Bennett, 2016, p. 17) for pupils and teachers. Analysis of data by Ofsted between 2005 and 2006 suggested links between behaviour and attainment, showing "where behaviour was good, attainment also tended to be good." (Department

for Children, Families and Schools, 2009, pp. 81–82). Taking these factors into account, behaviour becomes paramount when considering teaching and learning.

My personal experiences of teaching are in disadvantaged areas, firstly through the Teach First programme in the UK and then in a Swedish middle school which serves a community described as having a low socio-economic status (Nationella Operativa Avdelningen, 2017, p. 4). Teach First is a registered charity aiming to address educational inequality by placing trainee teachers in a school while they complete their PGCE. School eligibility is calculated using the Income Deprivation Affecting Children Index, and eligible schools fall within the government's 'Achieving Excellence Areas' which aim to improve pupils' chances of having a high-quality school place. Muijs et al (2010) suggest schools in disadvantaged areas often face "pressures such as challenging pupil behaviour" (p. 150). This is acknowledged by the Department for Children, Families and Schools, who noted schools in areas of deprivation, "tend to have pupils with poorer behaviour" (2009, pp. 81–82). It therefore became of vital importance for me to examine how leadership affects behaviour in schools such as these.

2. CRITICAL LITERATURE REVIEW

2.1 THE SWEDISH EDUCATION SYSTEM

Comprehensive schools were introduced in Sweden in the 1950s, and became compulsory in 1962, with the idea they would, "provide equal educational opportunities for all children, irrespective of family background" (Gustafsson & Hansen, 2017). The Swedish education system, once viewed as "the epitome of centralism" (Dobbin, 2014, p. 282) is becoming increasingly decentralized, with responsibility for schools falling to individual municipalities (OECD, 2016b, p. 5). The OECD (2016b) note the reality of this is often that socioeconomically disadvantaged families have less choice than their advantaged peers.

Traditionally, Sweden has been viewed as having a strong education system, which "provided high-quality, equitable and innovative education to children from all social backgrounds" (OECD, 2016b, p. 5). In the past, Swedish students performed "significantly better than the average" (Henrekson & Jävervall, 2016, p. 5) in international assessments into the 1990s. However, in the first PISA tests in 2000, Sweden did not rank near the top (Ringarp & Rothland, 2010). The Liberal Party supported the idea that "the lack of discipline in Swedish schools had impacted the students' poor showings in the international studies" (Ringarp & Rothland, 2010, p. 426). The OECD note a challenge for Swedish schools in that they appear to

have low expectations for pupils and poor discipline, which in turn leads to inadequate classroom environments (OECD, 2016b, p. 5), and recommended that funding is primarily directed towards improving the quality of teaching (OECD, 2016b, p. 7) and raising the prestige of teaching and educational leadership to make it more appealing (OECD, 2016b, p. 5).

The OECD note a particular challenge for Swedish education in the high levels of immigration that the country is experiencing. In 2018, Sweden received 132,602 immigrants, a number which has more than doubled since the year 2000 with an increase of 73,943 people (Swedish Institute, 2019). There is an increase in the difference in results between immigrant and non-immigrant pupils, and "the performance gap between immigrant and non-immigrant students in science is larger than the average across OECD countries" (OECD, 2016a, p. 1). First or second generation immigrants "score 70 points lower in science than non-immigrant students, before accounting for differences in the students' socio-economic status" (OECD, 2016a, p. 6). Gustafsson and Hansen (2017) note a possible reason for this may be language and cultural differences causing barriers to parents in supporting their children's education.

One area in which Swedish schools are widely seen to be successful is in the field of social and emotional learning (SEL), which became a feature throughout the 1990s (Humphrey, 2016). A new national curriculum was released, placing higher importance on pastoral functions in schools (Dahlin, 2010). Several objectives in this new curriculum encompass SEL ideas, such as "the promotion of respect and mutual support among students, and the development of empathy and feelings of community and responsibility in relation to the school" (Humphrey, 2013, p. 60). Skolverket currently advise that SEL should not be discretely taught in schools, but rather should be imparted and present in regular lessons (Humphrey, 2013).

There are divergent opinions about the success of the Swedish education system. One reason for this is that "there are differing views on the mission of a school and, as a result, the type of results that should be measured and assessed" (Henrekson & Jävervall, 2016, p. 7). This is supported by Precey (2013) who notes that, "Throughout many parts of the education world we are witnessing the spread of national standardized testing, a narrower curriculum with a focus on what we think we can measure (mainly in Mathematics, Science and English)" (Precey, 2013, p. 10). This highlights the competitive nature of the current educational climate and shows how success is measured by standardised tests in just a few subjects and areas. Contrary to this, Sweden's educational efficiency is testament to the country's focus on the well-being of the child, as noted in the LGR11 curriculum document which states "The task of the school is to encourage all pupils to discover their own uniqueness as

individuals and thereby be able to participate in the life of society by giving of their best in responsible freedom." (Skolverket, 2011, p. 5).

2.2 TRUST, TRANSACTIONAL AND TRANSFORMATIONAL LEADERSHIP

The concept of a need for a rapid improvement in results can often push leaders in difficult schools into a transactional style of leadership based on functional relationships, meaning trust is lost in interactions between leaders and staff (Precey, 2013, p. 9). Sahlberg (2012) discusses some of the challenges faced by schools as the "Global Education Reform Movement (GERM)", where schools are judged on attainment in terms of standardised tests. Hargreaves states that GERM uses strategies which "have failed dismally over 2 decades in many Anglo-Saxon nations" (Hargreaves, 2012, p. 13). This is something Swedish schools must be aware of with the pressure of results on a global scale. Transformational leadership instead visualizes staff within schools collaborating to create a culture which represents the whole organisation (Precey, 2013, p. 12). Sergiovanni considers school culture as key in recruiting and retaining staff, and in improving staff moral and motivation. He describes the cultural "cement" of a school as "shared purposes, values and commitments" (Sergiovanni, 2001, p. 6) which make the different aspects of a school work together. School culture bonds staff through communicating values and sharing decisions, allowing staff to feel involved in and part of school life in a meaningful way (Sergiovanni, 2001, p. 9). This cultural "cement" can be seen as a key marker in a transformational style of leadership which allows vision to be shared and trust built between all members of the organisation. According to Precey, transactional leadership leads to the "erosion of trust" (2013, p.9) between leadership and s f. Alternatively, transformational leadership offers a vision of staff communicating and collaborating to build whole school values and goals to which everyone can subscribe and represent (Precey, 2013, p. 12).

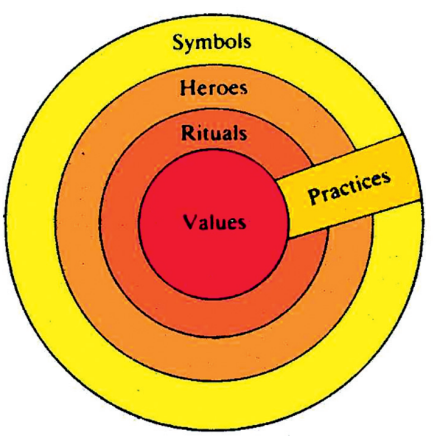
Transformational leadership is criticized by Shields (2010) as promoting school wide reform but neglecting the differing situations of children and communities. She notes one of the shortfalls of transformational leadership may be that it overlooks "the external, material realities of the students and their families" (Shields, 2010, p. 582). This is of importance when thinking of the diverse backgrounds of pupils in areas of Sweden. Shields proposed the concept of transformative leadership, which she perceives as distinct from both the transactional and transformational styles. Transformative leadership focuses on students' lives in the wider world as well as academically in school, and equips them to become happy and productive members of society. Shields notes transformative leadership "does not require a singular focus on test-preparation that narrows children's learning opportunities but, instead, requires rich, vibrant, and

engaging pedagogies and high expectations for all children." (Shields, 2010, p. 582). Therefore, transformative leadership challenges the negative effects of GERM by focusing on the whole child. This fits in well with the vision of education set out in the LGR11 Swedish Curriculum document which states: the inviolability of human life, individual freedom and integrity, the equal value of all people, equality between women and men, and solidarity with the weak and vulnerable are the values that the school should represent and impart. (LGR11).

2.3 SCHOOL CULTURE

Culture has been described as "the way we do things around here" (Deal and Kennedy, 1982, p. 4). It is the influencing values and ideals in an organisation (Kent, 2006), and "acts as a screen or lens through which the world is viewed" (Stoll, 1998, p. 9). It provides support and shared identity for people within the organisation, and guides their behaviours (Stoll, 1998). These shared ideals and values are at the heart of an organisation (Deal and Kennedy, 1983, Hofstede, 2001) and are expressed through "customs, rituals, symbols, stories and language" (Stoll, 1998, p. 10). These ideas are expressed in Hofstede's 'cultural onion' (below), with values at the core, emanating through rituals, heroes and symbols. 'Practices' intersects the three outer layers, suggesting that these come directly from the core values of the school, allowing these values to influence the life of the school. However, school culture is both "one of the most complex and important concepts in education" (Stoll, 1998, p. 9), and I would argue that there are many other influences affecting the way in which a school's values permeate through practice.

Scheme 1. Hofstede's Cultural Onion



Source: own work

2.4 LEADERSHIP AND SCHOOL CULTURE

Kent ascertains there is a "widely held assumption that leaders are able to shape and mould culture within their organisations" (2006, p. 24). Hall and George support this theory, noting that "no matter what the leader does (and does not do) the effects are detectable throughout the school" (1999, p. 161). They explain that the way in which teachers understand the decisions the principal makes sets the culture and climate of the school (Hall and George, 1999). Kent, however, perceived "a richer and more complex collaboration of different people and voices who influence the culture of a school" (Kent, 2006, p. 27). Students identified the influence of school leaders in the culture of the school in Kent's study, however believed that culture was produced together, with teachers and students also having a significant effect. In fact, Kent determines that "students appear to be united in rejecting the notion that any one figure such as the head teacher provides the dominant influence upon culture" (Kent, 2006, p. 27).

Stoll discusses the importance and complexity of school culture, however she notes culture is often forgotten about when considering school improvement (1998, p. 9). When trying to change the culture of a school, results can improve short term, while long term "the moral and working conditions of teachers deteriorates" (Fullan, 2002, p. 2). The work to be done in schools is not for the principal alone, and in order to create better schools we need to transform educational cultures (Fullan, 2002, p. 2). Fullan notes how change in schools is often "structural, and superficial" (2002, p. 6) and discusses the importance of changing people's values and continuously improving relationships. He ascertains "the single factor common to successful change is that relationships improve" (Fullan, 2002, p. 27). As a result, he conceived the 'Cultural Change Principal' (CCP), an ideal of the values and characteristics held by a principal leading school transformation. This categorizes "five core components of leadership: moral purpose, understanding change, relationship building, knowledge creation and sharing and coherence making" (Fullan, 2002, p. 3). These mirror many of the ideas written about earlier in relation to transformational and transformative leadership, and highlight the importance of engaging with school culture in order to profoundly transform a school.

3. METHODOLOGY

After exploring the existing literature, two key questions emerged for my research. These were:

- How effective are behaviour management systems at School X?

- How is the leadership of the school perceived to be contributing to behaviour management systems?

To counteract the possible negative effects of being both teacher and researcher, I wanted to use a variety of methods to ensure I provided as broad a range of data as possible. Thomson and Hall also note the importance of using multiple methods to collect data. "A school is a complex organization and requires more than one, two or even three ways to get to know it as a place" (Thomson & Hall, 2016, p. 194). Therefore, using different methods to generate information allowed me to record data in different genres in order to create a full picture. Kent notes that previous studies into school culture "have tended to focus upon the views of teachers, producing a cultural perspective that reflects their attitudes and opinions" (Kent, 2006, p. 24). I felt it imperative to gather data from multiple sources across the school, including students, teachers, leaders and support staff, to provide a balanced and unbiased assessment, and therefore used a staff survey and interviews alongside a student survey and focus groups to collect my data.

For practical reasons, I asked participants to complete the staff survey online. I hoped this would be the quickest and most convenient option, and would therefore yield the most responses in a short period of time. McNiff notes the importance of taking all viewpoints into account (2014, p. 23), and so the survey was sent out to all staff at the school, including the student care team and the administration staff, who all deal with students on a regular basis. A benefit of surveys is they allow the researcher to "relate one characteristic to another and to demonstrate that certain features exist in certain categories" (Bell, 2005, p. 14). I hoped that through using a survey in this way I could show a considerable amount of data around staff opinions on the effectiveness of behaviour management and leadership at School X, and use this information to inform my selection process for interview participants.

It was important to interview the Assistant Principal for Student Care, who developed the behaviour management policy, and the Safety and Discipline Manager, as well as a cross section of staff identified from the questionnaires. I used a semi-structured interview approach to allow me to focus discussions around my research questions, but also to follow up interesting or relevant points brought up by interviewees. Bell reflects that in this structure, "the respondent is allowed a considerable degree of latitude within the framework…respondents are given freedom to talk about the topic and give views in their own time" (2010, p. 165). I wanted to give interviewees some degree of autonomy to express their thoughts on the topics without being overly guided or influenced by the questions.

For the student survey I used a Likert scale in relation to perceptions of the behaviour management systems, similar to one I used in the staff survey. I hoped this would allow me a basis for comparison, as well as a broad gauge of opinion across the student body. Other questions in the survey were qualitative in nature, to allow for categorisation of issues and also a deeper analysis of how students understand behaviour, the behaviour management systems in school and leadership's effects on these.

Focus groups seemed a good way to gather information on pupils' thoughts on behaviour from across the school, as body language and translation tools could be used to ensure understanding with pupils who struggled with English. Thomson and Hall suggest that focus groups are often used "as a means of generating discussion that might otherwise not be available to the researcher…But who selects the group is important" (2017, p. 161). I wanted to ensure I had a cross section of pupils from across the school, and asked my colleagues to help in selecting groups of six pupils from each year group, with a range of academic abilities and backgrounds.

4. ANALYSIS

I presented my research data according to my research questions to allow me to identify trends and make links between the different data collected, as well as providing an overall picture of how issues are perceived.

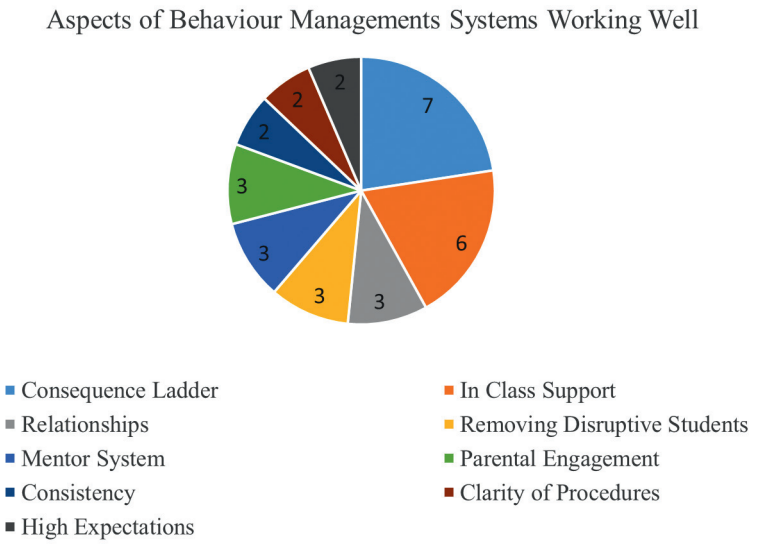
4.1 HOW EFFECTIVE ARE BEHAVIOUR MANAGEMENT SYSTEMS AT SCHOOL X?

I included questions in the staff survey which directly addressed this research question: "What is working well in the behaviour management systems?" and "What could be improved in the behaviour management systems?". I mapped responses into categories, and noted how many staff had mentioned each one, see below:

Staff Perceptions of Behaviour Management Systems (Fig. 1 & 2)

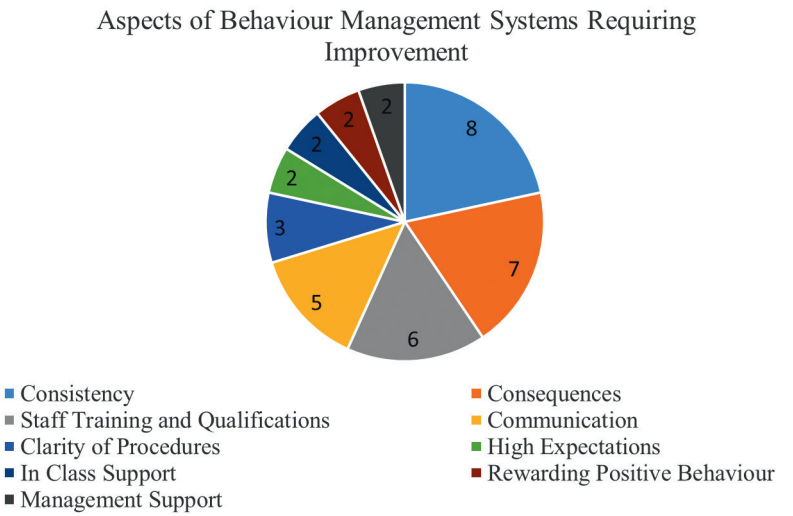
The main behaviour management system at School X is the consequence ladder, a three-step system where the final step is the student being removed from the classroom. This was perceived as the most effective tool by staff, as 17 of the 33 staff who completed the survey mentioned it in their responses. Interviewee 1, who was involved in developing the policy, noted a belief that teacher buy in was high, stating, "I think, I feel, that the majority of teachers in the school buy into it." One teacher wrote, "Consequences ladder easy to follow and understand by student and

Figure 1. Aspects of Behaviour Managements Systems Working Well



Source: own work

Figure 2. Aspects of Behaviour Management Systems Requiring Improvement



Source: own work

staff members" suggesting the consequence ladder is well embedded and staff believe in it.

Despite being contrary to Swedish educational culture of using differentiation to allow students to remain in classes, removing disruptive students from class was noted as joint third response by staff of things going well in the behaviour management systems. This was supported by interviewee 3, who believed the main benefit of the consequence ladder for staff is, "you can continue to teach, take them out, so you can continue to teach, so you don't have to bother about solving conflict in the classroom, or taking care of crying children in your classroom, or taking care of the discipline because that takes time from your teaching." Several grade 8 students expressed some real frustration in the student survey around the disruption some students cause in class, meaning other students cannot focus on their academics. One student wrote that many others, "talk in class, disturbs everyone, are mean to the teachers and show disrespect to the people that wants to learn…they ruin for people who care about school." A student in grade 6 particularly noted time out of class as an important tool for them in managing their behaviour. They wrote about how student care helped them, saying, "They have given me this five minute ehh walk, and that helps me a lot, like sometimes like, when I really feel I need to move around instead of disrupting people I can eh tell the teacher, "Can I take a walk?"" This reinforces the idea some students need time out of class, and this should be taken into account when differentiating and personalising education.

Despite many staff appreciating the benefits of the consequence ladder, students were not always convinced of its success. This was apparent in the grade 6 focus group: there is of course the consequence ladder which was a big thing in the beginning of the year but now, it happens so often, teachers kinda delay it. Like, they give warnings but nothing really happens, so the students have kinda learnt it now, so they know nothing will happen, so they just keep on disrupting.

Although this student saw the consequence ladder as an important and prominent part of the behaviour systems at School X, they highlighted inconsistency throughout the year, and a lack of follow through, and showed frustration that it was no longer as effective. The staff survey showed agreement with this, as consistency was mentioned most often by staff as an area requiring improvement. This was also captured in the student survey, "some adults give you chances and some just send you out and call your parents." Achieving consistency between members of staff is particularly difficult when staff come from a wide range of different educational and training backgrounds, in many different countries.

After consistency, consequences were the second most noted aspect of the behaviour system requiring improvement. One participant in the staff survey inferred,

"it seems the consequences are not pushed far enough, or there is some sort of lack of discipline to apply the consequences on a higher level." This was supported by a pupil in the grade 6 focus group, "if you're already in trouble you just do it again maybe, and then you get to skip class time, and so that's a reason why maybe someone would do it as well," suggesting current consequences are not acting as a deterrent for all pupils.

Interviewee 1 pointed out the strong relationship between behaviour management and building trust between students and teachers – essentially, building relationships with students. They explained the reasons for using a behaviour management system based around correcting the behaviour as opposed to focusing on consequences, as they felt when the current principal arrived at the school "there had been a strong leaning towards a very, very consequence-based behaviour policy and I think the trust somewhere had broken down somewhere between the student body of the school and the staff of the school." The idea behind this was to build trust by making the behaviour policy, "more focused upon children getting back into learning, about solving the immediate problem, rather than thinking about what is a consequence gonna be." This idea was pointed out by several pupils, "if the teachers are polite towards them and calm and patient with them, then they tend to act more.... willing to work." Students discussed how if the teacher is perceived to be disrespectful, then pupils are likely to react in the same way. Pupils acknowledged some members of staff have more time to understand the causes behind behaviour, and supposed that teachers needed to focus on teaching and academics. Pupils in the grade 7 focus group expressed frustration with this, noting that teachers don't discuss behaviour with pupils and either refer it to someone else or phone home directly. These comments suggest some mistrust around relationships between pupils and teachers, however acknowledges the value of the student development and school counsellor systems.

Staff training featured strongly in the staff surveys and this was also noted in the OECD surveys in the literature review, which recommended teacher training as a priority in Swedish education. Pupil comments in the focus groups also suggested that some teachers did not have sufficient strategies for dealing with behaviour, "Like say someone has been disrupting, and then someone does a minor mistake, then that's when they give major consequence for a very tiny mistake, I don't think it's…..pretty.…harsh." The staff survey answers around consequences showed a lack of knowledge around the use of the behaviour system to build up understanding and trust between staff and pupils, and indicated that there is more work to be done in this area. Staff training is a key aspect of transformational leadership, and through training staff feel more equipped to deal with behaviour, as well as gaining a deeper understanding of the values behind the behaviour policy.

4.2 How is the leadership of the school perceived to be contributing to behaviour management systems?

Interviewee 1 explained the vision behind the behaviour policy as discussed above, to move towards a policy which solves the reasons behind poor behaviour as opposed to focusing on consequences. This is supported by Bennis and Manus' (1985) theories, that vision, communication and building trust are key aspects of successful leadership. The challenge for leadership at School X lies in satisfying all stakeholders, pupils, staff and parents, and ensuring the vision behind the behaviour policy is communicated to all.

When asked, "Does the leadership team contribute to behaviour management across the school?", 24 of the 33 respondents gave a positive response, 5 a neutral response, and 2 gave fully negative responses. The majority of the negative comments in response to leadership's contribution to behaviour management focused around consequences. One member of staff noted in the survey, that there was a "Distinct lack of implementing consequences for repeat bad behaviour." Another made reference to the Swedish curriculum, "Help is given whenever asked for and do their best within the confines of Swedish and / or [name] school system." This seems to show more dissatisfaction with the Swedish and school systems as opposed to school leadership, however there is still a necessity for communication and training around the vision behind the policy and the Swedish curriculum.

Many teachers in the staff survey felt supported by the leadership team, with 16 members of staff mentioning support explicitly in their response to the survey question around leadership. Interviewee 4 noted a positive response to the leadership team in their communication, stating that they are successful in, "being receptive to issues for students and teachers, and being able to talk about them together". Some teachers, however, wanted more support, noting "as things stand, mentors – i.e. teachers – are responsible for applying all aspects of management systems, sometimes making teaching secondary to managing behaviour: such a distribution of responsibilities is tiring at best." In this instance, perhaps, further support around teacher training could help teachers to feel equipped in dealing with behaviour in the classroom.

The concept of support for staff fits with the vision of transformational leadership, where staff communicate and collaborate to work towards the school's goals. Although there is evidence that staff believe in the vision and goals filtered down from leadership, there is also evidence that some do not fully understand the vision behind the behaviour policy. Interviewee 5 discussed this:

> I'm thinking about the all staff meetings, when the principal talks and sometimes, yeah, it feels like.....those meetings can be very good because we get unified and he talks about the vision for the school and how it's going and what he wants to do, and sometimes it can feel a bit preachy as well. But I think that's the main thing I see, is those meetings when they're talking about what they want to do.

In this way, the staff meetings can be seen as one of the rituals of Hofstede's Cultural Onion, with the leadership team as the heroes of the culture. Interviewee 5 highlighted the unifying nature of the ritual for staff, however also noted that it can seem 'preachy' which suggests the vision is solely coming from the leadership team. The literature review referred to the importance of ensuring devices are in place to allow staff to be involved in decision making (Precey, 2013, p.12). The challenge, then, lies in not only supporting staff, but certifying they understand and feel involved in the vision of the school around behaviour management in order for the behaviour policy to be fully effective.

5. CONCLUSION

The most effective behaviour management tool perceived by staff was the consequence ladder, with the main benefit being disruptive pupils are removed from lessons, so a calm learning environment can be maintained. This was supported by some pupils who felt disruptive pupils were unfair on the rest of the class. Other students who struggled with behaviour noted this time out of class as useful for them in refocussing and being able to re-enter the classroom.

However, students and teachers noted a lack of consistency around the consequence ladder and how it is used. Students felt that some teachers gave chances, while others sent pupils out straight away for minor issues. Students also felt that being sent out of class was a threat which was not often followed through. In addition to this, teachers felt there was a lack of final consequences for poor behaviour. Students also inferred that once they were in trouble and had reached the final step of the consequence ladder, there was no point in improving their behaviour as nothing further was going to happen. Consequences, fairness and consistency are key in the success of the consequence ladder. The Swedish educational system focuses on supporting as opposed to punishing behaviour, and public sanctions and consequences for behaviour are frowned upon. Despite teachers finding this the most effective tool in managing behaviour in the classroom, there

are still challenges to be addressed in fully implementing it to fit the situation of my particular school.

Interviewee 3 explained the vision of the behaviour policy as solving the problems behind behaviours as opposed to giving consequences for these behaviours. The staff survey showed frustrations around a perceived lack of consequences for behaviour, however it also showed an overwhelmingly positive response in relation to leadership's contribution in the way of support in relation to behaviour management across the school. Staff survey comments showed that leadership are involved and visible in managing behaviour on a daily basis, and this is building trust with staff. Vision, communication and building trust were noted in the literature review as key areas for leadership and Hall and George (1999) note that the way in which teachers understand leadership decisions sets the tone for the culture of the school. The final hurdle, then, at School X seems to lie in communicating the visions behind the behaviour policy in order to ensure a complete buy in from all staff.

My data findings strongly support Fullan's theory presented in the literature review – that "the single factor common to successful change is that relationships improve." (Fullan, 2001, p. 27). The predominantly new leadership team at School X has begun to build the trust necessary to support successful relationships with both students and staff, and both parties believe that behaviour is improving as a result. The final steps in building these relationships lie in communication and staff training around the visions of the behaviour policy, and in finding further ways to allow staff to collaborate in order to build a vision for the policy which can be represented by all staff. In this, leadership can ascribe to the aspects of transformational leadership described by Precey, where staff are communicating and collaborating to build whole school values and goals to which everyone can subscribe and represent (Precey, 2013, p. 12).

This chapter is focused in one school in one country but there are implications and lessons for other schools in other situations.

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IMPROVING ASSESSMENT GRADES WITHIN THE TRANSFORMATIVE LEADERSHIP FRAMEWORK

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Abstract

This research analysed the impact of an intervention programme in the East of England that implemented a Transformative Leadership approach, with the aim of improving the General Certificate of Secondary Education (GCSE[2]) test results which seek to measure the attainment of 16-year-old students in different subjects.

The Transformative Leadership Framework outlined the key criteria of Transformative Leadership:

- Working towards a vision
- Being more inclusive
- Being more equitable
- Having an awareness of privilege and poor injustices
- Having a goal of individual, organisational and societal transformation
- Prioritising collaboration
- Seeing actions as mutually beneficial
- Redesigning management structures
- Having a goal of organisational change
- Focusing on organisational effectiveness
- Making links with education and educational leadership to the wider social contexts
- Working with the community

The schools were selected to participate in the intervention if they had a high percentage of students from disadvantaged backgrounds, identified as being Pupil Premium[3]. Disadvantaged students on average perform lower than their wealthier peers. However, this intervention

successfully improved the GCSE pass rate of these disadvantaged students to a higher rate than the national average by providing equity[4] in the form of additional academic support.

Keywords: intervention, GCSE, intervention, pupil premium, equity

1. INTRODUCTION

The disparity in educational achievement of students is evident across the globe (OECD, 2018; Jerrim, 2017). No country has completely eliminated the attainment gap between the general cohort of students and students who are considered disadvantaged. This includes those with:

- English as an Additional Language (EAL) – Not native English speakers; English is an additional language to their mother tongue.
- Special Educational Needs (SEN) – A learning difficulty or disability that makes learning challenging. They experience greater difficulty learning than others of the same age.
- Those who receive Free School Meals (FSM) – Free meals provided by the school to economically disadvantaged students.

However, many countries around the globe have very successfully minimised the gap – more significantly than England. Using data gathered by the OECD (Organisation for Economic Co-Operation and Development) PISA (Programme for International Student Development) survey, Jerrim (2017) compared the socio-economic gaps in the performance of highly able UK pupils to international pupil data. The report concluded that although England compares quite favourably to the rest of the United Kingdom and other industrialised countries in terms of the academic performance of its highest-achieving students, countries such as Finland and Estonia have made significantly more progress in minimising the attainment gap.

2.1 EDUCATIONAL LEADERSHIP AND MANAGEMENT

Leadership and management go hand-in-hand and are considered by many as overlapping, but it is important to realise they are not synonymous (Bohoris and Vorria, 2018; Ratcliffe, 2013; Lunenburg, 2011). It is possible to be a successful leader, but not so much of a successful manager and vice-versa (Lunenburg, 2011). The qualities

of leaders and managers work complementary with each other (Lunenburg, 2011; Kotter, 2008, 2000 and 1988). Bennis (1989) notes the differences by stating management is 'doing things right', whereas leadership is 'doing the right thing'.

Although some qualities of leaders and managers overlap, there are also key distinct differences. Leaders are:

- Visionaries
- Inspirational
- Creative
- Innovative
- Calculated risk-takers
- Mission-driven
- Clear communicators
- Focused on long-term results
- Lead with integrity
- Exquisitely sensitive to context (Bottery, 2004; Leithwood, Jantzi and Steinbach, 1999; Burns, 1978).

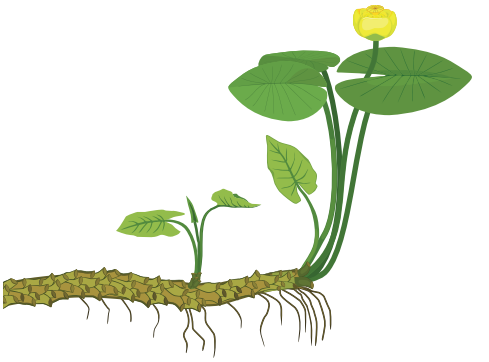
They are guardians of the organisation's values, whereas, managers:

- Accept responsibility and directions from leaders
- Create a plan to execute the vision
- Prioritise
- Cautiously delegate
- Assess and minimise risks and motivates others (Bohoris and Vorria, 2018; Sharma and Jain, 2013; Kruse, 2013)

2.2 TYPES OF LEADERSHIP

Shields (2018; 2010; 2009; 2003) describes two approaches to leadership that centre on nurturing relationships – transformational and transformative leadership. Whereas **transactional leadership focuses on the exchange and rewards, transformational and transformative leadership focus on a vision and positive change** (Bass & Riggio, 2010; Burns, 1978). Shields (2018; 2010; 2009; 2003) explains the differences between transactional, transformational and transformative leadership. Whereas the process of transactional leadership is about mutual agreement and benefit, the process of transformational leadership is about redesigning management on the basis of working towards a vision for organisational change and effectiveness.

tree



rhizome

The process of transformative leadership is the same as transformational leadership, with the deconstruction and reconstruction of social/cultural knowledge frameworks that generate inequity and an acknowledgement of power and privilege injustices with the goal of individual, organisational and societal transformation. Shields notes that transformative leadership links education and leadership with the wider social context within which it is embedded to support a more inclusive and equitable education system that is academically successful; **transformative leadership holds the most promise and potential to meet both the academic and the social justice needs of complex, diverse and troubled education systems** (Shields, 2010). As Precey (2014) outlines, transformational leadership respects, engages and works with people within a school, whereas, transformative leadership does so with the whole community both inside and outside the school. Transformative leaders are aware of the complexity of their networks and how to use them successfully. The rhizomatic theory is a philosophical concept based on the multiplicities of the botanical rhizome. The rhizome can be used as a metaphor to explain the interconnectedness of teaching and learning. During my training in Early Years, the understanding of the importance of multidisciplinary practice for the wellbeing, care, safety and safeguarding of children is regularly emphasised (Education and Health Partnership, 2020; Greenfield, 2010). However, I did not see this same level of collaborative practice during my time teaching in Secondary education. Transformative leaders need to work with other educationalists, not in competition with them, to truly see a positive change within schools and, later as a result, society.

3.1 RESEARCH DESIGN

This research aimed to understand whether transformative leadership has a positive effect on Year 11 (aged 15-16) students' GCSE results (the grades awarded for GCSE exams). The schools within the local area have been selected to participate in the programme if they have been identified as having a high number of Pupil Premium eligible students. The schools then nominate their own students to take part in the programme, with the criteria being that the student is not expected to achieve a grade 4 or above (a passing grade), but could achieve it with support and interventions. For this intervention, the course consisted of 8 sessions of 3 hours over the course of a term. The resources were created from feedback given in the Examiner Reports from various Exam Boards of the previous year and a baseline (initial) assessment. Homework was given and students should have been supported by relative or friend elected as a Mentor for the student.

The cost of the programme includes: teacher recruitment, coordinators, teacher and pastoral support payment, and additional staff to organise the logistics of the programme, bus passes for students attendees, lunch for students and teaching and learning resources. The teaching space and university reps were generously provided fortnightly on a Saturday by the local university or schools partaking in the programme.

3.2 METHODOLOGICAL APPROACHES

This study used an adapted version of Brookfield's (2017) reflective lenses and Kolb's (2014 and 1984) learning cycle as a reflective framework. Brookefield asserts that the route to understanding is through critical reflection (reasoning process to develop meaning from an experience. Identifying, exploring and questioning of thoughts and responses to situations). Leaders, teachers and teaching support staff should develop their pedagogy through a continuous cycle of reflection (Reardon et al, 2019; Brookfield, 2017; Nager, 2017; Cunningham, 2012). To become a critically reflective leader, leaders should gain an understanding of their leadership effectiveness through as many perspectives as possible (Chandler, 2018). Brookfield (2017) proposes:

- Critical literature
- The autobiographical experiences of teaching and learning
- The learners' eyes
- Our colleagues' eyes

This research additionally added the lens of leaders and of the community. Consideration of these six lenses supported an in-depth and effective evaluation of the intervention and its use of the TLF.

4. FINDINGS AND ANALYSIS

4.2.1 VISION

A vision is a mental image of what you want for the future. Colleagues, leaders, community participants and I all agreed that having a vision was important and all perceived educational leaders to also have this view. All learners also agreed, however, 11% of learners did not perceive this to be important to educational leaders. I believe this intervention has been created with the transformative vision because I see that they have attempted to address each criteria of the TLF, as will be detailed in this section; this intervention is ensured more children passed their English GCSEs and go on to bright, successful futures and can positively contribute to society. The leaders also saw the intervention as offering more than a GCSE grade, but opportunities to 'successfully move on to their next steps' and build a positive future. However, many teachers offered transactional responses to this question. Transactional teaching will foster transactional learning; we need transformative teachers to see transformative learning. Going forward, I would recommend that organisers hold a meeting with all staff, students and parents on the first day of the intervention to outline the transformative vision of the intervention and how each and every member has a responsibility to contribute to its realisation.

4.2.2 MORE INCLUSIVE

Leaders, the community, a high percentage of colleagues and I personally agreed that education needs to be more inclusive, to recognise the diversity of students. The majority of all participants also agreed that this was important to leaders. From my perspective, I thought this intervention recognised that students come from different backgrounds and have different needs: SEND support was provided to those with learning needs and bus passes were provided to all students to ensure no students were economically disadvantaged. **This intervention was making education more inclusive by supporting students to meet the goals set out for them by schools.** To make this intervention 'more' inclusive, it should be opened to any student wanting to improve their grades, not just borderline students.

4.2.3 MORE EQUITABLE

To be equitable means to be fairer, by distributing resources to points of greatest need, rather than evenly across all. In an educational context, this means if students have different needs, they need to be fairly supported; students with greater needs would get more support. Leaders, the community and I all personally agreed that this was important and perceived this to also be important to leaders. A high percentage of students and teachers also agreed, but both were more skeptical about whether they thought this was important to leaders. From my experience of teaching in schools, I saw the need for time and money to be invested into making all schools more equitable, but as it currently stands, I do not see it as an achievable goal for leaders because of financial constraints. This issue was raised by educational leaders in interviews. **Teachers agreed that this intervention was making education more equitable by providing students who needed academic support with more tuition.** I believe this intervention was providing equity, it could be *more* equitable in future if it was open to more students who wanted to self-elect to attend.

4.2.4 AWARENESS OF PRIVILEGE AND POWER INJUSTICES

Privilege injustice means that some people have advantages over others. For example, a student from a high-income background might have more of an opportunity attend a school that has more resources and achieves higher outcomes in contrast to a student from a low-income background. Leaders, the community and a high percentage of students and teachers agreed they and leaders have an awareness of these injustices. Through this intervention, both leaders I have worked to support disadvantaged students, to combat these injustices and close the attainment gap. **This intervention provides equity by tackling privilege and power injustices in providing additional tuition to schools with a high number of Pupil Premium students.**

4.2.5 GOAL OF INDIVIDUAL TRANSFORMATION

Individual transformation is the goal of changing and developing yourself. This was agreed by 100% of participants, but only an average of 53% of learners, teachers, leaders and the community agreed this was important to leaders. Students may feel as though leaders are focused too generally on whole school targets and overlook individuals, this is something students relayed to me and colleagues during my time teaching at school. **This intervention provided an opportunity for all**

adults involved to make individual transformation by sharing best practices and improving their pedagogy. Similarly, by supporting students through the programme, this intervention encouraged students to make individual transformations by focusing on their studies and improving their future life chances. For future interventions, leaders should outline how this intervention is benefitting all those involved and how it can support them on their personal development path.

4.2.6 GOAL OF ORGANISATIONAL TRANSFORMATION

Organisational transformation is the goal of changing and developing an organisation. For example, schools working with outside professionals (such as this intervention) to boost schools' GCSE grades. All participants were unanimous in agreeing on this importance, but their views of leaders' perspectives were largely varied. Leaders and I agreed entirely that this was important to leaders, from meetings we have had with other school leaders, this is often at the forefront and is the basis of this intervention's efficacy. Teachers stated that to promote organisational transformation in schools, leaders need to engage with all staff more, to understand the school's needs. This intervention helped to create an ethos of working together as schools, rather than competitively against each other. **This programme helped to transform this approach, seeing schools who usually compete, supporting each other during this programme, developing organisational effectiveness.** The programme directors and I envisioned a future where people would work together for the benefit and productivity of everyone. For the success of future interventions, schools need to continue this collaborative network of schools across the city.

4.2.7 GOAL OF SOCIETAL TRANSFORMATION

Societal transformation is the goal of changing and developing society. For example, this intervention helped students gain better GCSEs, so that students can enter into more successful career paths and contribute better to society in the future. All participants personally saw the importance of societal transformation. A high percentage of learners, leaders, the community and I perceived this to be important to leaders. In terms of education, I would like to see a development for a lifelong love of learning and a commitment to bettering the community you work in. Starkly, only 57% of teachers perceived leaders as seeing this as important. **Looking specifically at this intervention, colleagues stated that it promoted societal transformation by bringing students to the university; being part of this programme could develop attributes such as confidence and other areas that are not only linked**

to attainment, which can impact society if everyone had similar opportunities. When considering future interventions, leaders should consider the wider impact on the community and its future.

4.2.8 PRIORITISE COLLABORATION

To 'prioritise collaboration' means to treat working together as very important. This intervention program worked in collaboration with schools across the city where this study takes place. Collaboration has been crucial to the construction of this intervention programme. It has included the collaboration of the Department of Education, those working for the intervention, multiple schools across the city where this study takes place, the hosting University and the team running the intervention on the session days. Colleagues, leaders, the community and I unanimously agreed on this importance, yet only 67% of learners agreed. From my experience of working in schools, students do not always understand the time taken to plan lessons, mark books, etc. Therefore, this could indicate that they have not critically thought about what collaboration has taken place and how collaboration could positively impact the learning process. Only 53% of learners, colleagues, leaders and the community see collaboration as important to leaders. Leaders of this programme have seen a reluctance of other school leaders to work together and as a result, has negatively impacted their perception of other school leaders. Interviews with colleagues highlighted how a lack of transparency during the creation of the programme has negatively impacted the teachers' awareness of the collaboration that has undergone. **The teachers seem to see themselves as separate entities to the programme and thus leaders. From my teaching, this feeling is something I feel is largely echoed in schools – the 'them and us' dichotomy.**

For the success of all students in the city, this collaborative network must be maintained. A successful working network of schools could set precedent for other school networks to follow suit and break the borders between educational institutions, so all can work towards a common good.

4.2.9 MUTUALLY BENEFICIAL

'Mutually beneficial' means that it is good for everyone involved. Colleagues, leaders, the community and I all saw the intervention as mutually beneficial. However, only 45% of students agreed. Through discussions with the students during sessions and from the results of the intervention, we can see this intervention is beneficial

for students, but students may not understand the benefits for the teachers involved. This intervention is beneficial for the teachers because they get to:

- Experience teaching in a university
- Teach alongside new colleagues with different skills and knowledge
- Teach a variety of students with different abilities and backgrounds

It is beneficial for students because they get to:

- Develop independence and confidence as they take ownership of their learning
- Attend a university
- Be taught by new teachers and learn alongside new peers.

Teachers develop their practice and students develop individually and improve their grades. For future interventions, I suggest that during the initial meeting with participants as suggested earlier, leaders outline how the intervention will positively impact all those involved and the wider community. This will increase motivation and collaboration in the programme.

4.2.10 REDESIGN MANAGEMENT STRUCTURES

To redesign management structures means to change who is in charge. This intervention achieved this, as the English and Maths Leads, as well as other leaders on the programme, had a variety of different teaching experience. Leaders, the community and I agreed entirely that this was important, a high percentage of teachers agreed, and a low percentage of students agreed. From my experience in school, SLT was overstretched which meant that not everything was done as well as they would have liked. **A fairer distribution of tasks is needed, and more influence needs to come from teachers, rather than being imposed upon by leadership.** This notion of the need to flatten the hierarchy was mentioned in multiple interviews. In schools, I did not see this being done, but with this intervention, I did. Leaders of this intervention criticised schools for being too risk-averse which means they would rather hold the reigns. There was a sense of trust from this intervention's programme director, who allowed me to organise the resources with teachers and teach the lessons with autonomy. This foundation of trust allowed leaders and teachers to have integrity in their work. In my opinion, this was **one of this intervention's biggest successes that promoted the collaborative network.** Everyone felt as though

they were working as a team and everyone had their role in this intervention's success, which meant everyone was highly motivated. This is a crucial aspect which must be carefully considered for the success of future interventions.

4.2.11 ORGANISATIONAL CHANGE

Organisational change means a change in the way an organisation is run. For example, changing the routines in a school to meet the needs of the students. Leaders and the community were once again in full agreement on the importance of organisational change, with a high percentage of teachers and a low percentage of learners agreeing. I see a need for organisational change in schools, but do not see leaders working towards this in school. Students can see the divide between schools in the city. Support staff, the community, a high percentage of learners and I felt as though leaders were promoting organisational change. This intervention has promoted organisational change and hopefully challenges school leaders to consider changing the way their organisations are run by working collaboratively with other schools across the city. For future programmes, it is essential that the vision and values of the programme are outlined to demonstrate how the intervention plans to effect change. This is important to build motivation and enthusiasm for the programme.

4.2.12 ORGANISATIONAL EFFECTIVENESS

Organisational effectiveness is how well an organisation (such as a school or this intervention) is doing against holistic measures (for example, to include criteria such as performance and wellbeing of those involved). Focusing on the grades that students receive is focusing on organisational effectiveness. Again, leaders, the community and I were in agreement on this importance and students and teachers moderately agreed. Leaders, a high percentage of learners and colleagues and I agreed that organisational effectiveness was important to leaders. I believe that too much focus on attainment grades has resulted in schools focusing on pushing as many children just over the pass line as they can, rather than supporting all students to make progress and stretching high ability learners. **A strong focus on organisational effectiveness has resulted in schools working against each other in order to be the highest attaining school, rather than in collaboration to ensure the progress and success of all students.** For future interventions and within schools, I suggest that leaders consider more than just attainment grades as measures of effectiveness. Leaders should take a more holistic approach, considering: behaviour records, attendance records of both students and staff, analysis of student progress and students' feedback.

4.2.13 LINKS EDUCATION AND EDUCATIONAL LEADERSHIP WITH THE WIDER SOCIAL CONTEXT

Educational leaders can address wider social contexts through education. For example, schools and leaders can question injustices in society. Leaders, the community, a high percentage of learners and colleagues and I agreed this was important. Although the community and I agreed fully that leaders found this important, not all learners agreed and a very low percentage of teachers and leaders agreed. Colleagues stated this intervention gave students an opportunity to meet other learners through the programme and provides students with a wider context for their learning. Students see that they are not isolated in the process and that teachers from other schools are echoing the same messages. Teachers noted that students can learn about wider social issues through the material they are learning. This intervention's session booklets looked at political and environmental newspaper articles which successfully generated discussions about the wider social context. Colleagues noted that although leaders may understand there it is important to make these links; they do not have the time or capacity to do so. I would recommend that schools regularly update their resources to address current wider social issues. Leaders need to create an ethos that schools are about developing children holistically and developing an awareness of the adult world.

4.2.14. WORKING WITH THE SCHOOL AND THE COMMUNITY

Some schools work with parents and businesses in the community to improve future life opportunities for students. Other schools with poor parental engagement see this task as futile and have not invested the time to engage parents. Colleagues, leaders, the community and I were unanimous in agreeing on the importance of working with the community and this was also agreed by a high percentage of students. The community, a high percentage of learners and I agreed that leaders see this as important, but a low percentage of colleagues and leaders agreed.

The intervention has made links with the community through the Mentor Programme and the hosting university has a strong outreach programme with the community. For future interventions, teachers suggested parents/guardians/mentors should be invited to the first session, to:

- Meet the teachers
- Have a look at the resources
- Get advice on how to support the students in their studies.

4.2.15 TLF SUMMARY

Leaders, the community and I agreed with 100% of all 14 criteria of the TLF, closely followed with colleagues agreeing on 91% of the criteria and learners agreeing on 71%. The intervention was successful because leadership always worked towards the TLF criteria. **The percentage of personal belief was higher for every participant than their views on leaders' perspectives.** This demonstrates that participants did not see leaders as holding the same values as them. When looking at educational leaders of this intervention, I agreed that leaders perceive 100% of the TLF criteria as important. However, it is important to note that if I were to answer this questionnaire about educational leaders on the whole, the results would not be as positive. It is important to recognise this when looking at the other data collected because many participant answers were influenced by their perception of leaders in schools and did not answer solely about the leaders involved with this intervention. In descending order, 82% of the community, 72% of learners, 71% leaders and 60% of teachers perceived leaders as agreeing with the framework.

The TLF highlighted a disparity between participants' own views and their views on leaders, with the starkest being between teachers and leaders. Excluding myself, the narrowest gap was between leaders and their view of other leaders, which is likely because they work closely with other leaders and have a more privileged understanding of their views. This highlights the need for leaders to be more transparent with their decisions and to consider flattening the hierarchy within education, to promote a more collaborative and successful way of working. Developing a collaborative way of working can make a great impact on the attainment and future opportunities of students (Salt, 2017). **For future Transformative interventions, I would endeavour to outline how the intervention aims to fulfil the 14 criteria of TLF and this would be shared with colleagues, students, leaders and the community.** I would also ask colleagues, students, leaders and the community to review the success of this and outline their own recommendations within these criteria.

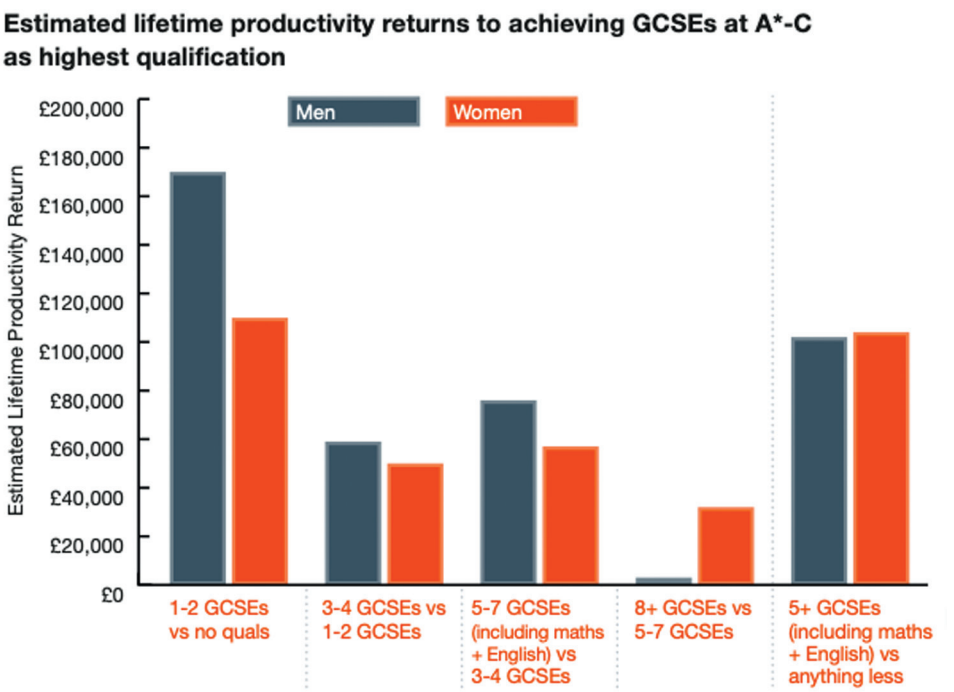
5. REFLEXIVE ANALYSIS

The data collected was impacted by Covid-19 restrictions, but as noted by my university, 'it is a widely-acknowledged factor of practitioner research that 'things happen' to disrupt and change the best-laid plans'. Although I was able to collect some data, it is only representative of those who were able to be contacted, willing to respond to questionnaires and make themselves available for distance interviews. If

this research were to be repeated, I would work to increase samples sizes and conduct in-person interviews to increase the validity and reliability of results. However, I would argue that data is still valid, and the views expressed are likely to be representative of the participants and wider community.

6. CONCLUSION

Figure 1. Estimated lifetime productivity returs to achieving GCSEs at A*C as highest qualification



Source: Hugh Hayward, Emily Hunt & Anthony Lord - Department for Education, The economic value of key intermediate qualifications: estimating the returns and lifetime productivity gains to GCSEs, A levels and apprenticeships, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/387160/RR398A_-_Economic_Value_of_Key_Qualifications.pdf

The programme cost £30,958.82 to run and supported 165 students. This worked out at £187.63 per student or £213.22 per passing GCSE grade.

The lifetime productivity returns of a person with 5 GCSEs (including English and Maths) versus another person with fewer qualifications contributes on average £100,000 more over their lifetime; by investing £213.22 per passing GCSE grade now, we could see a £100,000 over that person's lifetime returned. The government needs to consider this when deciding on the education budget, considering interventions such as this as a long-term investment.

The Programme Director of this intervention suggested that schools in the city where this study takes place pool Pupil Premium funding to fund this intervention, however, this has been faced with some reluctance from leaders who are too risk-averse. Even with the data evidencing this intervention's success, leaders still feel reluctant. This highlights the biggest obstacle for student success: leaders' resistance to working collaboratively for the greater good of all students, instead of simply their own.

The programme successfully accomplished its mission of increasing the pass rate of borderline students through taking a Transformative Leadership approach. There was a strong adherence to the TLF values from the leaders which further illustrates the importance of leaders in motivating others and working together to achieve the vision. All those involved worked continuously towards the vision of the intervention. The intervention was a success: the pass rate of students in both academic years (73% in 2019 and 88% 2020) outperformed the local and national average (70.5% in 2019). These students will now have an increase in opportunities in their future and can contribute more successfully to society.

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POST-PANDEMIC PONDERINGS: LEADERSHIP LEARNING FROM THE 2020 CORONAVIRUS CRISIS

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Abstract

In this chapter, Precey and Fisher provide a critical analysis of the transformative leadership actions taken by the leaders of a federation of primary schools in a deprived area of London, during the Covid-19 pandemic of 2020. Using Precey's (2015) framework for effective transformative leadership, the authors analyse the values-based leadership decisions and actions taken to minimise any widening of the attainment gap between the most vulnerable pupils and their peers, as a direct consequence of lockdown.

The authors examine the gap between the directives from central government and their implementation in the local community. They explore three key facets of transformative leadership: Firstly, the type of values-driven leadership that is most likely to be effective, both now and in the future. Secondly, they consider the importance of learning at all levels of the institution, for leaders, teachers and pupils. Thirdly, drawing on rhizomatic theory as an illustration of the complexity of the coronavirus crisis, they propose the attributes required for leaders to be even more effective: Principals with principles.

The authors conclude that the shock of the pandemic is a clarion call to transform education, arguing that school leaders need better preparation to lead in complex, sometimes ambiguous circumstances. The authors advocate a more community-minded approach to school leadership, along responsible, rather than responsive lines. They call for the prioritisation of training, for both current and future leaders, in transformative approaches, so that they can prepare children for life in the post-pandemic "new normal" and beyond.

Keywords: coronavirus, transformative, leadership, future, case study, rhizomatic theory, networks, complexity, values

1. INTRODUCTION

2020 saw a, hopefully, highly unusual event when human activity across the world went into lockdown. It was a time of testing for everyone especially leaders - leaders in all spheres: politics, health, social care, business and also education. The deadly Covid-19 virus is believed to have started in China and it spread around the globe at an alarming pace. The first United Kingdom death of a person tested positive for Coronavirus occurred on 5th March. By Friday 13th March UK cases of coronavirus rose by over 200 in a day. Premier League fixtures were suspended and the London Marathon was postponed.

On Wednesday 18th March the Conservative government announced that all schools were to close with effect from Monday 23rd March. On Thursday 19th March it was announced that schools should remain open only for vulnerable pupils and children of key workers, although at this time the definition of 'vulnerable child' and 'key worker' were not made explicit. This soon became clearer (those deemed to be vulnerable, or with Education Health Care Plans or children of Key worker - those who have to work to keep essential services running e.g. health care workers) but many of these parents/carers chose not to send their children to school because they were fearful of contagion at school. This lock down lasted until June 1st for Years 1 (aged 5–6) and 6 (aged 10–11 years) and Year 10 (aged 14–15). It was not until July 4th when schools slowly started to have a voluntary phased return for other students after an unprecedented 15 weeks of school closure for the vast majority of students.

Although there was central and local government guidance during this time it was up to individual school leaders and their governing bodies to manage the closure.

2. HOW DID SCHOOL LEADERS RISE TO THE TEST?

Albert Camus, the French-Algerian novelist and philosopher, wrote "La Peste" (The Plague) in 1947, ostensibly about the plague sweeping across the Algerian city Oran of but also in part as an allegory of the Nazi occupation of France during the war ("la peste brune"). Sales across the world rose dramatically in 2020 (in UK by 3,000%). He also wrote "An Appeal to Doctors Fighting the Plague" as a precursor to "La Peste". Although school leaders are not doctors of medicine, much of Camus' straightforward and succinct advice and observations about human nature in all its absurdity and heroism still resonate 73 years later.

"You must become your own masters. And, for example, know how to respect the laws ….like the ones pertaining to blockades and quarantine. …but you mustn't forget what is for the general good either"

A CASE STORY OF OUSTANDING SCHOOL LEADERSHIP DURING THE PANDEMIC

Many schools in England displayed outstanding leadership during the pandemic. This chapter focuses on one particularly good example.

Federation X consists of 2 primary schools (A and B) with children aged 4–11 in an inner city area. Both serve areas of high deprivation where circumstances conspire to limit the pre-school academic and social development opportunities of students. Roughly half of the students receive free school meals, over 90% are from ethnic minorities and 80% speak English as an additional language

The way the Executive Headteacher and Head of School dealt with the crisis gives illuminating insights into how outstanding senior leaders with staff (teaching, support, support agencies, local authorities) and governors operate. They had to balance 2 seemingly competing values:

- a passionate belief in the value of education and children being educated in school particularly since many have challenging home situations
- a desire for children and families to be safe during the pandemic

Appendices 1, 2 and 3 are the running notes from the Executive Headteacher during the crisis up to early July 2020. They are a running account of the issues that needed to be managed and the running story gives an unusually deep understanding of leading in an unforeseen and unprecedented crisis. Decisions had to be made even before Government closed the school (see Appendix 1). Having made that decision, preparations had to be made to close the schools (Appendix 2) – a complex process. Next, the education of children and support for families had to be planned, put in place and monitored (see Appendix 3).

Initially central Government closed the schools involving some essential, functional systems to be put in place (see Appendix 1). After that it was left to schools to interpret central and local government guidance (and lack of it) within their own context and resources. How did the leadership of this Federation respond? Precey wrote an article in 2015 ("The Future is not what it used to be: School Leadership Today for Tomorrow's World (Part 1) that examines the type of transformative

leadership that is likely to be most effective now and increasingly so in the future. This will form the framework to examine the leadership during the Coronavirus crisis.

1) Why do this leadership job? The need for constant values in changing times. Principals need principles

It is values that provide the rudder when the storms threaten to blow an organisation off course. Much is written about the need for a values-based approach to school leadership (Fullan, 2003; Hammersley-Fletcher, 2015) Less has been written about how in practice leaders can think more deeply about their moral purpose and their values. Robbins & Trabichet (2009) helpfully explore ethical decision-making by educational leaders and Rayner (2014) describes headteachers' values being tested by changing policy context. Interestingly, there is far more literature on values on the business world from which educational leaders may learn such as Audi, R. (2012), Caldwell, C., Truong, D, Linh, P. and Tuan, A. (2011) Leaders in education need to go deeper and explore the way in which ethics affects every aspect of their lives as they seek to model, monitor and engage others in dialogue (Southworth, 2008). Take for example the elusive yet fundamental concepts of "equality" and "equity" (Espinosa, 2007). Are these fully understood by school leaders and how can they be applied in schools? Do school leaders understand the concept leadership for public value? (Leadbetter & Mongon, 2012). Educational leadership is essentially a moral calling and profession. So twentieth century leaders need thought-through values that enable ethical decision-making that keeps the organisation on course with a sharp focus. This has always been the case, but is the more so now as the future waters of education become more turbulent.

In the case of the Federation there was a clear focus of the leaders on values and moral purpose not just for the children's' sake but also the families as they are one and the same. This involved transformative leadership with equity and relationships as the focus. The leaders were concentrated on their students in the context of their home and communities (where for many adults English is a second language) as most students were at home. They prioritised safeguarding the mental health and well-being of families as well as the staff of the 2 schools. For example, in Appendix 2, the production of a list of pupils considered eligible to continue to attend school in line with Government guidance was quickly produced. It is apparent that in Appendix 3 procuring and distributing reliable food supplies to those in need and effective communication were priorities. Teachers regularly checking on students well-being was vital. Staff of Place 2 Be (the counselling services) made

phone calls to families already known to the service and, where appropriate, some who displayed anxiety during staff contact. All staff were contacted fortnightly by the Deputy Headteacher or senior leaders/line managers and contact information was recorded on a spreadsheet.

2) What is this education leadership job all about? It's learning, learning, learning.

Most important in such complex situations is that the leader has a sharp focus on the school's core purpose and in particular student learning. The learning of students in the school is paramount. This may well be infused with other fundamental values such as liberation, democracy, equity and justice depending on context (Shields, 2010). To enable this, staff need to be active, effective learners in order to reinforce and model its significance. In the case study, in addition to well-being, academic learning was deemed to be important to avoid a widening of the attainment gap between children (Appendix 3). This would be a major problem in terms of on-going student motivation and more work for teachers on return to "real" school. Staff in one of the schools who had experience of using the Purple Mash programme trained those in the other school. Parents/carers could be involved in their child's learning at home. Teachers tried to address the issue of lack of engagement of students, which may have originated with the child or the parent/ carer, in their phone calls. Where the issue might have signalled an emotional concern, this was communicated to the Inclusion Team. The school's Speech and language therapist initially offered online sessions for her case children. A 'social-distance library' was been set up where children could come one at a time and choose age-appropriate books. This gained in popularity.

The monitoring of students' engagement and learning was aided by establishing a GoogleDocs spreadsheet at each school to record all contact made with students. This was called the 'Strategy List'. It included a page for each class which included student-level information on each contact, listing the date, type of contact (telephone, email, face-to-face etc.) and any relevant information gathered. An 'etiquette' was devised in the use of this (see Appendix 3). Staff were asked to complete an entry on the appropriate page each time they made contact with a student. This Strategy Lists were discussed in the respective Senior Leadership Team meetings and this evolved so that concerns were dealt with by the school inclusion teams.

3) How can leaders do a better job in the future? Smart, fit principals with attitude.

a) Attitude

The attitude that leaders take and develop in their roles is critical to their success. In more uncertain times ahead in this world, attitude becomes even more significant. This was especially so in this crisis and these included:

- Bravery and courage. This means leaders who are hard-headed, with a focus on making a positive difference regardless of unreasonable opposition and challenging circumstances. Shields (2010) makes the point that leaders have to demonstrate moral courage and to effect deep and equitable changes. Karsath (2004), a Norwegian writer, uses the term "Robust" in that they can tackle challenges in a climate of uncertainty and a spirit of critique. Making a positive difference is being pre-occupied with the care of other human beings, long term transformational change and a co-operation and emulation rather than competition and denigration. The bravery and courage displayed by the case study leaders in dealing with a myriad of new strategic and procedural decisions was clearly evidenced in the appendices. When many schools were closing down to their communities, they were opening up.
- Passion. Without passion we will not easily sustain our commitment or convey our enthusiasm and commitment to others. Davies & Brighouse (2010) claim that passionate leadership is about energy, commitment, a belief that every child can learn and will learn, a concern with social justice and the optimism that we can make a difference. Such leaders, they say, articulate the vision, share their values, set examples and standards, are committed to the long term and they care and celebrate. A passion for the children and their communities runs through the actions of the leaders in this case study and is evidenced in the Appendices.
- Hope. Wrigley claims that teaching is a profession of hope and this is even more so leadership. "The desire to improve education arises naturally from an engagement with the future" (2003 p1). Throughout the months of the crisis the leaders displayed behaviours and competencies especially in the existing communication strategies that were built on and developed afresh. These were reassuring to teachers and families offering hope at a time of potential hopelessness.
- Humility. School leaders are public servants but not servile. Humble leaders are committed to positive change to manage the crisis but always remember that it is not about them. It is about the school community. The leadership revealed in the Appendices was not autocratic but was humble enough to draw on the expertise and local knowledge of Place 2 be, Family Liaison

staff, the SENCO and local community groups. The experience has also been useful in highlighting the effectiveness of staff at all levels. For the leaders, these conditions exaggerated the competence and attitude of staff for good and for bad.

- Persistence and Determination. Transformative leaders need dogged determination. The leaders in the case study were, for example, intent on ensuring the basic need of food was there where it might not be left to market forces. In Appendix 3, the provision of food during school closure had been restricted to those families entitled to benefits-based free school meals. Unfortunately, this precluded those families recently impoverished directly or indirectly as a result of coronavirus or the lockdown. Both schools received regular deliveries of food from a charity called Magic Breakfast. School A has also had weekly deliveries from a grocer and the Felix Project. Additional supplies were organised by Café Spice Namaste, through whom, for example School A were given four 10kg bags of rice from Tilda. The leaders negotiated so that both schools received 15 meal packs a day from the Seafood School at Billingsgate Market. Both schools distributed food packages to those families deemed most in need. At School A this happened weekly; typically, 25 to 40 packs were collected from the school.

b) Smartness

Transformative leaders need to be smart in a number of ways. As the world becomes more complex there is need for leaders to:

- understand and learn to lead in complexity, be comfortable with ambiguity and develop networking and connectivity. Transformative leaders are aware of the complexity of their networks and how to use them successfully. Rhizomatic theory is a philosophical concept based on the multiplicities of the botanical rhizome. It is a helpful and interesting way to visualise the networks, some almost hidden, that were developed during the crisis by the case study leaders based in some cases on existing relationship and networks. The rhizome can be used as a metaphor to explain the ever-extending roots just under the surface that weave together in complex ways (Deleuze & Guattari, 2019). Sometimes the leaders engineer and facilitate these. Sometimes they develop on their own. We handle complexity all the time in intuitive ways and often fall foul to its consequences. For leaders, including those working in highly complex systems such as schools, much is not knowable. But we can be smarter. To be so, leaders (and managers) need to try to recognise and

respond appropriately to the essential elements of complexity theory. This is a way of thinking and understanding the reality of our world. Leaders need to be able to deal with real life and all its rich complexity. Fullan (2004, p. 55) states that "leaders must resist the temptation to try "to control; the uncontrollable". Scharmer (2007) maintains that this requires repetition to be able to understand and work in situations of emerging complexity where:

- the solution to the problem may well be unknown,
- the problem itself is frequently still unfolding and,
- the key stakeholders are often not clear.

Radford (2008) writes about a growing need to be comfortable with complexity and its resultant ambiguity and uncertainty and sees schools as places that by their nature verge on the edge of chaos. Smart leaders, who thrive in increasing complexity, have their fingers all over the political, economic, social and psychological pulses. They scan the horizon looking for the elements of complexity – points of bifurcation, connectivity, feedback, evidence for self-organisation and emergence, attractors and recursive symmetries, lock-in, feedback and post-event rationalisation. They exploit their benefits and try to reduce their dangers. In Appendix 3 there is evidence from the case study schools that the leaders were able to work comfortably with complexity to develop networks to help students and their families. For example, where the learning problem was about pupil access to devices, the schools had limited capacity to loan school equipment to pupils, but took steps to do so. This process took some time to implement. It involved identifying suitable equipment (it was found that School A had 7 devices available and School B had 14), reconfiguring the equipment to work off-premises, agreeing a rubric for recipients, writing a loan agreement application form and adapting an acceptable use policy, identifying appropriate recipients and arranging collection of the devices and signing of agreements. Financial support was also gained from a former school governor. The substance of the weekly zoom meetings between the leaders and Chair and vice-chair of Governors was relayed by the Chair to all Governors each week so that they were fully informed of key emerging issues.

- be self-reflective and be adaptable to learn fast. Twentieth century leaders need to be self-reflective. Scharmer (2007) suggests that leaders of organisations need to provide space for and facilitate a shared seeing and sense-making of the newly emerging patterns. He calls this "co-sensing". This requires leaders at all levels to establish places of deep reflection ("co-presencing"). This is difficult in the busy life of school leaders but, he would maintain,

essential. He also suggests that we need places and infrastructures for hands-on prototyping of new forms of operating in order to explore the future by "co-creating". In an increasingly complex world leaders need to create opportunities for shared observation and reflection to which one might add experimentation. Without this, Scharmer argues, we will continue to have schools that prevent our children from unfolding their capacity for deeper learning as we will be relying on past experiences to solve new, previously inexperienced problems. His views became even more true in the crisis and the fact that the senior leaders in the case study were in regular frequent contact with the whole community and especially with each other. Importantly this included challenging each other's decisions leading to better decisions. A weekly Zoom meeting with the Chair and vice-chair of Governors designed to support and challenge aided this reflection and adaptability. Moreover, although it is one Federation, it is 2 schools, so policies had to be tailored to suit local circumstances

- be critical and cultivate a culture of healthy scepticism Leaders who can work with complexity and ambiguity do not unquestioningly accept the status quo but are ever watchful. Wheatley (2007) explains that such watchfulness is accomplished by developing a set of questions that leaders ask regularly and with discipline. Quantz, Rogers and Dantley (1991) argue that transformative leadership "requires a language of critique and possibility" (p. 105) and "a transformative leader must introduce the mechanisms necessary for various groups to begin conversations around issues of emancipation and domination", p, 112). In the same vein, Shields (2010, p. 58) maintains that transformative leaders, "in addition to the more traditional aspects of their work (creating budgets, overseeing instruction, achieving accountability etc.) need to balance both critique and promise and challenge inappropriate uses of power and privilege". Karsath (2004) calls this Reflekterende where such leaders encourage critique and scepticism. The central and local government, although well intentioned, were, at times, unhelpful in their decision-making and advice. The leaders in the Federation had to cope with this in a constantly changing political and policy landscape maintaining a clear sighting on their purpose- great education for all children supported by teachers, parents and the community.
- be realistic and not naive e.g. about power. The crisis was a high-risk situation and the leaders in the Federation understood their liabilities in legal terms. They had to comply with new laws but where there was discretion, e.g. on who and how children returned to school, then they were able to skilfully

and creatively manage the situation to give maximum benefit to children and their families.

c) Fitness for Purpose

In this turbulent education pandemic sea, leaders needed to ensure they were fit in all senses of the word. Leadership is often physically, emotionally and intellectually exhausting as a result.

- proper selfishness. To be effective in the real world of school complexity requires leaders to place the oxygen mask over their own faces before applying them to others on the education flight. Handy (1997) calls this "proper selfishness". In the Federation the leaders state that the co-leadership model of the Executive and School Leaders working in a genuinely shared way meant there was strong mutual support. They were able to support each other through the highs and the lows and apply the oxygen mask to each other. A burnt out leader is not just of no use but is also potentially damaging to others. If the pilot runs out of oxygen, then the plane will crash.
- well-being. Well-being and achieving a balance between the professional and personal entail a deliberate personal strategy to ensure that all aspects of a fulfilling life are met. It is essential that leaders invest time in their own personal development and growth. ". . . high levels of wellbeing mean that we are more able to respond to difficult circumstances, to innovate and constructively engage with other people and the world around us. As well as representing a highly effective way of bringing about good outcomes in many different areas of our lives, there is also a strong case for regarding wellbeing as an ultimate goal of human endeavour." (www.nationalaccountsofwellbeing.org, p. 1). The wellbeing of leaders so that they can maintain a sense of proportion and balance is imperative when they are dealing with others for whom mental health concerns were growing. The weekly zoom meetings with the Chair and vice-chair of Governors were felt to be valuable by the leaders to gain a sense of proportion. The close working relationship between the two leaders was felt to be of paramount importance in relation to each of their well- being.
- developing resilience and an inner strength. Resilience is increasingly seen as a key part of an effective leader's make-up in the twenty first century (Arond Thomas, 2004). Resilience is strength of character, adaptability, buoyancy, flexibility and the ability to bounce back. It is very much linked with the former point about learning quickly from poor decisions. Through the trials and tribulations of leadership resilience can be developed (Ackermann et al., 2002). The

journey can make one a better leader (Campbell, 2008). Resilient leaders have realistic goals in their lives. They are thoughtful rather than impulsive and they are good communicators. They feel positive about themselves and others for whom they care. They are energetic optimists. They take control of their own minds and lives. They develop effective support networks which they use and contribute to. They have a sense of humour. An important issue in the crisis was 'Quis custodiet ipsos custodes?' - who cares for the carers? Legally that is the role of governors in English education and the weekly Zoom meetings also played some part in this.

Albert Camus's advice in "An Appeal to Doctors Fighting the Plague" is perhaps none more fitting for some school leaders and teachers than "There is nothing better than to drink a reasonable amount of wine to lessen, somewhat, the dismay that will engulf you when facing the city in the grips of the plague". It is not suggested as a sure-fire recipe to ensure fitness for purpose in a crisis.

Figure 1 shows the main strategic areas developed by the leaders during the pandemic crisis.

Figure 1. transformative leadership in case study school federation

Source: own work

3. CONCLUSION

Many other schools displayed outstanding leadership during the Covid-19 crisis, though not all. And it is not over yet (at the time of writing July 2020) as until a vaccine is found, further local or national infections may occur.

So what has been learnt from the crisis thus far? It is possible to identify three big potential areas of learning.

Jason Cowley, the editor of the New Statesman, wrote 3 April 2020 that at a macro level it will accelerate trends already in play (economic, psychological, health, state)

1. the fragmentation of globalisation
2. the return of the protective state
3. the hardening of national borders and restrictions of free movement
4. the necessity of more resilient supply lines
5. the need for greater investment in public services and the public realm.

If so, these will, and should, all profoundly shape education now and in the future. In the analogy of when a frog is dropped into cold water and heated up slowly it will cook to death. When thrown into boiling water it will jump out and survive. (readers please do not try this at home)

1. The shock of the pandemic should spur us all into action to develop a more effective education system for children to equip them for a very different future. The future truly is not what it used to be. Or will we, like the frog, just be content to boil?

2. The pandemic experience should challenge and change our accepted wisdom of leadership and move us to a more transformative community-minded approach as outlined in this article and in this case stud. Biesta (2013) helpfully distinguishes between the current responsive management and the need for responsible in a global networked society. A responsive approach is where education simply adapts to the demands of a global networked society. A responsible approach demands a more critical position "vis-a-vis the different manifestations and demands of such a society" (p. 733). He argues for the latter from school leaders on the grounds that education should always be understood as more than just a function of existing social and societal orders because it comes with a duty to resist. This is inherently both educational and democratic.

3. We must prioritise the training of current and future school leaders to be effective in the "new normal" and beyond. We know a great deal about how adults and

especially leaders learn. We need to insist that leaders are properly trained to lead transformatively. Using the criteria in this chapter would be one way. (Precey, 2015: "Preparing School Leaders for this: Developing Twenty First Century Leaders")

Values awareness, with moral purpose, pedagogical focus, attitude, smartness and fitness for purpose are then some the main elements of successful leadership in the twenty first century. Leadership matters. Leadership that values people matters. As the twentiy-first century rolls on with its uncertainty, ambiguity and complexity, the development of leaders who value people matters. Such leaders must be supported to develop to be prepared and able to stride into the twenty-first century mist with integrity, intelligence, passion, bravery, hope and humility. In this way they can try their best to ensure that a child born today can have a bright future, as a result of the education they will provide. The pandemic has accelerated the need to change and this case study reveals and honours exceptional leadership.

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APPENDICES: ON-GOING NOTES FROM EXECUTIVE HEADTEACHER

APPENDIX 1: MEASURE TAKEN PRIOR TO THE DECISION TO CLOSE SCHOOLS

- Off-site trips using public transport cancelled or postponed.
- External visitors to school, such as reading partners cancelled or postponed.
- Children instructed on the importance of washing their hands and sneezing into their elbows.
- Children asked to bring in personal water bottles.
- Boxes of tissues put in classrooms.
- Rigorous hand-washing regime before and after lunch.
- Additional cleaning of door handles and push plates.
- Premises staff instructed to check and fill soap dispensers regularly.

APPENDIX 2: PREPARATIONS FOR SCHOOL CLOSURE

- The Strategy spreadsheet to monitor pupil wellbeing and engagement was created.
- Purple Mash was set up. This is a cross-curricular website for nursery and primary school children. It enables teachers to set work remotely and children to complete it at home. Teachers can leave verbal and written instructions and comments, which children can reply to, allowing a dialogue between pupil and teacher. Purple Mash contains over 25 open-ended tools and educational games that let teachers deliver lessons, no matter what subject. There is everything from painting and game design to mind-mapping and spreadsheets. There are hundreds of scaffolded writing templates, on subjects from English and history to art and science.
- Creation of 'parents@' email addresses
- Updating of parent contact details (mobile and email addresses)
- Production of list of pupils considered eligible to continue to attend school in line with Government guidance (those deemed to be vulnerable, or with Education Health Care Plans or children of Key worker – those who have to work to keep essential services running e.g. health care workers)
- Friday assembly set out coronavirus social story (with prayer and blessing by priest linked to the Federation).
- School Business Continuity Plans updated. Contingency plans for parents and staff produced.

- Meeting with all staff to inform them of the situation. Staff were expected to be available for work unless, due to their own or a close family member's high risk, they felt that they should not be included.
- Staff rota drawn up and shared.

APPENDIX 3: SCHOOL CLOSURE

1. Learning

1.1 In school Learning

Both schools opened on Monday 23rd March. Initially, School A had two children, brothers and School B had four children.

Government guidance included no expectations around educational provision, instead referring to 'childcare'. Provision at school included fitness, art, computing, games and an opportunity to work on Purple Mash.

Government guidance stated that, where possible, children should be safely cared for at home to limit the chance of the virus spreading. Therefore, the Executive Headteacher (EHT) spoke to the mother of the two brothers at School A who agreed to keep them at home. School A was then closed. Families of children on the vulnerable list at both schools were contacted again on 14th April and 8th May to enquire whether they now required a place at school.

School B has remained open throughout. Attendance has varied on a daily basis, but gradually built up in both schools until school closed for the summer holidays especially after July 4th.

1.2 Online Learning

School B was already using the Purple Mash online learning package which enabled work to be set by curriculum subject and by year group. It also allowed teacher-pupil communication School A's teachers had attended training on this, at School B, earlier in the year and so the decision was taken to set up an account for School X too. Staff were given a quick refresher of the system on Thursday 19th March. It was estimated that, at first, the participation rate was about 50 to 60%. This slowly crept up after phone calls and follow ups, but dipped again over the Easter holiday.

The main barriers to learning fell into two categories:

a) technology – this might have been a lack of appropriate devices (laptops, tablets etc.) or household connectivity problems.

One solution was for teachers to provide hard copy packs of worksheets.

Where the problem was about pupil access to devices, the schools had limited capacity to loan school equipment to pupils, but took steps to do so. This process took some time to implement. It involved identifying suitable equipment (it was found that School A had 7 devices available and School B had 14), reconfiguring the equipment to work off-premises, agreeing a rubric for recipients, writing a loan agreement application form and adapting an acceptable use policy, identifying appropriate recipients and arranging collection of the devices and signing of agreements.

b) lack of engagement – this may have originated with the child or the parent/carer. Teachers tried to address this in their phone calls. Where the issue might have signalled an emotional concern, this was communicated to the Inclusion Team

The school's Speech and language therapist initially offered online sessions for her case children. However, due to the safeguarding requirements for remote teaching this had to ne ceased.

1.3 Offline Learning

Offline learning, in the form of worksheets that can be completed away from an electronic device, were provided by teachers for, those who cannot access online learning and for some lower achievers/ Special Education Needs pupils, who cannot access the level work set. Sensory equipment was provided for some ASD pupils.

In addition, teachers set weekly 'challenges' for all children that get them away from screens.

1.4 Other

At 'social-distance library' has been set up where children could come one at a time and choose age-appropriate books. This gained in popularity.

2. Communication

A variety of different instruments have enabled the school to communicate with its stakeholders to a significant extent.

2.1 Text

This was usually used to signpost families and or staff to an incoming email or YouTube video. Texts were sent in bulk, up to 160 characters, using the 'Teachers2parents' system. This facility had been used regularly prior to the school closure.

2.2 Email

2.2i. Teachers2parents also has an email facility. Prior to the shutdown, the administrative staff took steps to update and verify the parental email database, which had been incomplete. This email system allowed documents, such as the newsletter, to be attached for distribution.

2.2ii. The school uses London Grid for Learning (LGfL) 'Staffmail' for all staff. This is managed through Outlook with groups set up for SLT, Governors and other significant groups.

2.2iii. A dedicated email address was established specifically for parents/ carers to contact the school (parents@...). Parents were encouraged to use this as their first point of communication as the school phone lines were unlikely to be monitored regularly and staff needed to ring fence their individual mail addresses for 'normal' business. The parents@ email address could be accessed by Senior Leadership Team and administrative staff.

Two measures were introduced to manage this facility:

- parents/ carers were asked to use the subject line to define the content, e.g. free school meals vouchers, or to provide the name of a specific member of staff to whom the email is addressed.
- Inbox subfolders were created to differentiate between subject categories

The parents@ account was used extensively for questions about Free School Meals vouchers, help with technological problems, general enquiries and to submit work to teachers.

2.3 Telephone

Administrative staff were not expected to attend school each day therefore the school phone lines were not prioritised. However, 'phone calls did feature in a number of ways:

- Fortnightly phone calls were made to all pupils by teachers.
- Wellbeing check-ups by Place2be (P2B – a counselling service bought in by the Federation), School project manager, Deputy Headteacher & Special Education Needs Coordinator (SENCO)
- Calls to Special Education Needs families by SENCo

To avoid sharing private numbers, staff were advised to either come into school to use the school phone or use the 1471 facility to hide their number.

The EHT/ Executive head of schools (EHoS) advised staff who used their own phone, that the school would reimburse any costs incurred.

2.4 YouTube

The schools set up YouTube channels to provide content for pupils and families to feel connected with the school. This facility was primarily used for school assemblies, but additional content also made its way onto the YouTube channels.

2.5 Newsletter

School B continued to provide fortnightly newsletters. School A, where newsletters were previously provided half termly, moved to a fortnightly distribution. The newsletters focused on news about children's work, ideas for online and offline learning, wellbeing advice from P2B and information on where to get support from the local authority and other agencies.

2.6 Twitter

The schools' Twitter feeds continued to provide school news along with retweets of children's activities at home.

2.7 Website

The schools' websites had been due to be upgraded, with the previous hosting company withdrawing support. This change was beset by delays from the new host company. The schools tried to keep their information provided up to date. The new websites went live before the end of May.

2.8 Other

Purple Mash – teachers were able to send personalised messages to pupils and pupils are able to respond.

Zoom – this software was used to facilitate SLT meetings, staff meetings and will be used for the governing body meeting on Thursday 14th. The SENCo arranged staff training, from the local authority language support team via Zoom, although the well-publicised security concerns around Zoom were raised by a member of staff. By setting up its own password-controlled account, these concerns were minimised, but not eliminated. Where practicable, the EHT/ EHoS allowed staff to use the school's equipment for this purpose so that there was no risk to their personal devices.

WhatsApp – Initially Zoom was blocked on the school web filter system. Therefore, the EHT and EHoS's meetings with the Chair and Vice-chair of Governors were held on WhatsApp.

3. Food

The provision of food during school closure has been restricted to those families entitled to benefits-based free school meals. Unfortunately, precluded those families recently impoverished, including directly or indirectly as a result of coronavirus or the lockdown.

3.1. Local authority (LA)

The LA, who provide our school meals service were quick to act instructing their staff to attend school to provide meals for those children in school.

When School A closed, the LA offered to provide food packs or the FSM children. This offer was taken up and the food was packaged and distributed by school staff.

3.2. Government – food vouchers

A number of schools were already offering their own vouchers, which they had purchased from stores. Some parents were asking the schools A and B for vouchers. Therefore, when the scheme was announced, using a company the schools had registered, both schools immediately and our admin team began the process of uploading eligible parent details.

The system was beset by problems, some due to incorrect email addresses provided to the schools, but mostly of as technological nature because the company's system was clearly unable to cope with the volume of traffic. Visitors to the site could be waiting for several hours for data to upload or to register a query. The site was closed down over the first weekend which led to some improvement. The system still caused problems but most families were eventually able to access and spend their vouchers.

3.3. Other

Both schools received regular deliveries of food from a charity called Magic Breakfast.

School A has also had weekly deliveries from a Grocer and the Felix Project supplemented at times by Café Spice Namaste, through whom, for example School A were given four 10 kg bags of rice from Tilda.

Both schools received 15 meal packs a day from the Seafood School at Billingsgate Market.

Both schools distributed food packages to those families deemed most in need. At School A this happened weekly; typically, 25 to 40 packs were collected from the school. Where possible food was also given to families not registered as FSM, but known to be in need. School A had a food drop day on certain days inviting FSM families in to collect food boxes and books.

4. Monitoring

A GoogleDocs spreadsheet was created at each school to record all contact made with pupils. This was called the 'Strategy List'. This included a page for each class which included pupil-level information on each contact, listing the date, type of contact (telephone, email, face-to-face etc.) and any relevant information gathered. The following 'etiquette' was devised:

1. Always **insert a new row** for any new information, e.g. if two phone calls had been made these should appear on separate rows. Therefore, the number of rows next to a child's name should indicate the number of contacts we have had with that child.
2. There should be just **one Red-Amber-Green (RAG) rating** for each child. This should appear on the line beside their name and represents their current status. Subsequent rows should not contain any RAG ratings.
3. RAG ratings are as follows:
    1. Green = All seems to be OK – no immediate action
    2. Amber = possible risk – monitor (e.g., call back in a week)
    3. Red = Concern – requires action (e.g., P2B, SEN, safeguarding)
4. Mark as **'red'** any child who had not yet been contacted.
5. Mark as **'amber'** any child who was not using Purple Mash – unless the teacher was satisfied that they were completing an appropriate programme of work (mention what this is in comments).
6. If a child was not completing work, teachers should try to get an explanation for this, e.g. lack of devices, lack of connectivity, other etc.

Staff were asked to complete an entry on the appropriate page each time they made contact with a pupil.

The Strategy Lists were discussed in the respective SLT meetings; this evolved so that concerns were dealt with by the school inclusion teams.

5. Wellbeing

5. 1 Pupils

Initially teachers were asked to check on student's wellbeing in their fortnightly calls. On review it was felt that, where there were concerns about pupil wellbeing, this be separated from the general catch-up conversation and referred to the inclusion team for follow up.

5.2 Parents/ Carers

P2B SPMs made phone calls to families already known to the service and, where appropriate, some who displayed anxiety during staff contact. These families might have been referred directly by a member of staff or through the Inclusion team's audit of the Strategy List.

5.3 Staff

All staff were contacted fortnightly by the DHT or senior leaders/ line managers. Contact information was recorded on a spreadsheet.

School B had its first virtual staff meeting on Friday 8th May. School A had theirs scheduled for Friday 15th.

Those School B staff not isolating had occasional face-to-face contact when on duty at school. Some School A staff had face-to-face contact when organising food distribution. We were aware that staff had also been in contact with each other.

Staff on duty in school were provided with a hot meal and were able to leave when the last child has been collected at 3:30 pm.

6. Government announcement

On 11th May, the government announced that schools could reopen on 1st June for pupils in Nursery, Reception, Year 1 and Year 6. Government guidance was published; SLTs will worked through this and union advice to produce a plan for the return to school.

7. Safeguarding

An annex to Safeguarding Policy was written and received governor approval via email.

Advice on online safety at home was shared with parents/ carers through the school newsletters.

8. GDPR (General Data Protection)

The school received advice on GDPR issues from its Data Protection Officer and the LDBS Head of Data protection. LDBS is the **London Diocesan Board for Schools**. It is a Christian organisation committed to supporting and nurturing 156 Church of England Schools in London. Schools A and B are both Church of England schools.

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