

**Managing Creative Synergy in a Learning
Organisation with People with Profound and
Complex
Learning Difficulties and/or Disabilities:**

**A continuous quest for
integrated development and holistic maturity**

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Abstract

This action research study considers the challenges of organisational culture, leadership and management, staff development and collaboration in achieving quality of provision in educational and other services for people with profound and complex learning difficulties/disabilities. A holistic paradigm is formed from the study, in which the organisation is considered as an entity of which each learner and staff member is an element of the whole. Development of emotional intelligence competencies in addition to specialist skills and knowledge is explored, in relation to improving the responsiveness of staff to individual learner needs. The study casts a spotlight on the benefits of continuous creative dialogue within and between organisations that centres on the quality of experience of each person with profound and complex learning difficulties/disabilities as a potential partner in the development of the organisation.

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Introduction

As a practitioner-manager, I wanted to identify the components of quality provision for people with profound/severe and complex learning difficulties and disabilities (PCLD). I use the term 'complex' to denote inclusion of people who experience barriers to learning and development arising from the interaction of multiple difficulties. These multiple difficulties may include a combination of emotional-behavioural difficulties, social-communication disorders, mental health issues, as well as physical, sensory and/or medical disorders. The term 'profound/severe' refers to intellectual functioning which falls within the foundation learning tier or pre-entry levels.

During my 22 years in the field, I have witnessed provision which made me feel profoundly uncomfortable, in which it seemed to me that people with learning difficulties have not been treated well or respected. I have worked with mainstream schools and colleges who fail to respond to many of their non-disabled learners appropriately, too; sometimes even to the point of rudeness. But I have also experienced organisations in which staff and learners, for the most part, did treat each other with genuine mutual respect. It was my indignation about the former and my curiosity about the latter which prompted this research into the management and development of services for people with PCLD.

At the outset, I had expected to engage in investigations and action research which would enable me to isolate the components and pre-requisites of quality provision.

However, I quickly discovered that this seemingly straightforward expectation was highly complex and that the notion of 'isolating components' was off beam. In fact, I entered a labyrinthine quest which was to take me through multiple layers of investigation. It was an exciting journey, but along the way I had to choose which pathways to take; there were many options. The choices made about which paths of investigation to follow were strongly influenced by four learners in particular: Colin, Susan, Stephen and Carmello. These learners were with me at key times in my development as a person and as a practitioner and, therefore, helped me to focus on the experiential notions of quality which feature in this study.

I was less interested in the outcomes than the process and focussed on the ways in which the provision was *experienced* by those within it, rather than 'hard' outcomes such as qualifications or work. The main focus was educational provision, but some day centre and care provision was included through one of the three case studies and through the broader range of survey and interviews conducted. Although the research included some consideration of teaching and learning strategies, perspectives on quality of experience, such as responsiveness and satisfaction, emerged as the research developed.

In my choice of 'pathways', I elected to keep the focus primarily on social and communication experiences and outcomes, rather than other functional skills. Therefore, my definition of 'quality' in this context centred on the experience of the learner and staff in terms of their satisfaction communicated verbally and/or non-

verbally, such as through expressions of interest/engagement, progress/achievement and feelings of well-being/enjoyment.

For the purpose of this thesis, I have divided the study into three stages which reflect the emergence of the multiple layers to the paradigm which grew out of the study.

The first stage features the identification of 'key themes' which reflect the integration of findings from the literature and from the action research. The key themes identified are: (1) relationships and communication; (2) tailor made learning (including relevant learning and progress, structure and flexibility); (3) learner control (learner-led activity, motivation and choice). As the identification of these key themes emerged, I had considered taking a 'pathway' towards investigating the viability of trialling relevant actions to formulate a quality improvement model, which would provide a form of checklist for improvement. However, as the research developed, I felt increasingly uncomfortable with the notion of prescribing developments without taking into account some of the other layers which were emerging from the action research. As I listened to participants and observed behaviours, I was also losing confidence in the checklist approach. It was clear that, whilst most participants agreed about the key themes, there were too many other complex variables in each situation and circumstance to allow a simple checklist to work universally. This realisation was not an outright rejection of existing models and formulas. It was instead the result of the increasingly complex paradigm afforded to me from research which was exposing me to a fusion of emic and etic ontology. Some of the pedagogical approaches and good practice formulas were indeed most helpful in moving actions forwards and making improvements, but each set of issues,

personalities, timing and other similar variables could not be moved forwards using preset strategies.

At Stage Two, exposure to more detailed organisational case studies and the comments from participants about barriers to the development of the key themes, led to consideration of organisational culture and management practices as a dimension of the layered model of quality. The management literature, guidance and research abound with checklists and formulas. Again, recognising their usefulness in some situations, but not wishing to take that path only, I explored the *concepts* of organisational culture in the literature, alongside the accounts of critical incidents empirically. Some of the organisational culture literature helped to free my thinking from my manager-practitioner epistemology, in which I was seeking to 'fix' practice like a magician, by mixing the 'right' ingredients. Latterly, I was seeking a paradigm which would allow the 'magic' to happen through the holistic development of each organisation and each person in it, but at Stage One this was not yet clear.

Paradoxically, at Stage Two, viewing practice from the broader panorama of the organisation rather than from each teaching or training situation, generated signposts towards the additional layer of *individual* holistic development which is investigated at Stage Three.

Rather unexpectedly, towards the end of Stage Two, I began to glimpse ways in which some of my wider reading was connected with this study. Even before the research began, I had started to explore some of the literature arising from Einstein's theory of relativity. I had commenced this interest not through work, but through my

interest in 'energy' arising from many years of practising Tai Chi and Qi Gong. Therefore, I thought of my engagement with books such as those by Beck and Cowan (2006) and Currivan (2006) as separate from my formal study. On reflection, it should have been obvious that my thinking would be affected by delving into theories of the nature of reality! The Chinese use a word 'Hun Yuan' to symbolise the spirit of the notion to be 'integrated as a whole'. It was an emerging understanding of this concept which made me realise why I had found it impossible to successfully focus on one element of the model. Each element was part of the whole such that the quality of provision experienced by each learner was dependent on the degrees of synergy between each learner, staff and the learning environment, in each moment in time. Therefore, it would be necessary to create personalised focus on each of these elements and the whole, since each affects the other holistically.

As I have shown in Chapter 3 (Results and Discussion), the learners in particular were key in signposting the way towards investigation of the development of individual, holistic maturity of each person within the organisation. With help from the review of eclectic literature relating to person centred planning, teaching approaches, organisational development, spiral dynamics and emotional intelligence, I began to construct a new paradigm which held together the participants' views of key themes of quality and the organisational culture dimensions. My assumption that I would be recommending a set of strategies to improve quality for learners with profound and complex learning difficulties/disabilities (PCLD) was wrong. My research had shown that the way in which each person interacts contributes to the development of the organisational culture and that the quality of experience of each learner is profoundly

affected by the capacity of each person within the organisation to morph into a person who intuitively can respond and interact with the learner, in accordance with his/her needs at any given time or circumstance. This concept of responding and interacting to create development, resonated with the concept of relativity and so the connection with my 'other' reading emerged.

The concept of 'holistic maturity' emerged from discovering that quality of provision was bound with the ability of staff to learn from learners and colleagues, to gain both improved skills and enhanced internal self development. This concept encompasses both the development of knowledge and understanding and the development of the kind of intuitive and relationship abilities described in the emotional intelligence literature. However, this emphasis did not supersede the organisational dimensions; instead these both became integrated layers within the multi-dimensional view of managing learning organisations with people with learning difficulties and/or disabilities.

The word 'with', not 'for', is used here and features in the title, to emphasise that the learners themselves are instrumental in creating the organisational culture, in particular through the ways in which they support the development of holistic maturity of staff, as discussed in Chapter 3 (Results and Discussion). This does not preclude recognition of the role of learners in influencing through input on student councils, governing bodies and other similar roles. However, for learners with PCLD in particular, the more immediate and experiential role of influencing through day-to-day interactions should be additionally recognised.

The title also includes the words 'continuous quest'. This refers to both individual and collective (organisational) learning and development and reflects the focus on the infinite learning opportunities, for staff and learners and the organisation, inherent in each dynamic moment, interaction and circumstance.

Finally, with some caveats about the need to avoid preset strategies, I draw some conclusions about 'managing creative synergy' by presenting the integration of the dimensions of strategies, skills and development with organisational culture and individual holistic maturity and reflect on the challenges of identifying ways to consolidate synergistically individual holistic learning into organisational management and vice versa. The conclusion is designed to provide a framework within which there may be creative debate within and about organisations with learners with PCLD. It is the use of creative debate which offers the potential for non-prescriptive learning and development in which an organisational 'collective consciousness' may form. By developing a holistic paradigm, in which the organisation is an entity of which each learner and staff member is an element, I aim to throw a spotlight on organisational development and management in such a way as to engender debate that centres on the quality of experience of each person with profound and complex learning difficulties/disabilities as an organisational development partner.

Chapter 2: Methodology

Introduction

This study features action research, with elements of practitioner research interwoven, in keeping with an interpretive-constructivist epistemological model. I begin with a view that colleagues working with people with complex learning difficulties, in a range of contexts, have their own constructs for making sense of the work: ‘... the researcher’s goal is to understand the multiple social constructions of meaning and knowledge’ (Mertens, 1998:11). At the outset, my line of inquiry centred on understanding the perceptions of a range of practitioners to see whether there was some common ground. How do colleagues in the field, from different sectors, view the curriculum (or whatever they call it) for adults with complex learning difficulties? Are there underlying beliefs which are shared or different? Can these beliefs be converted into practice through identification of core principles and even into cross curricular elements?

As the research progressed, the focus of the study shifted away from analysis of the curriculum content, its relevance and applicability. The observations from questionnaires, interviews and visits led me to question whether it was the organisational culture and beliefs and their manifestation in practice, which impacted on the service to learners. This line of investigation reflects my own perspective on the importance of a curriculum which supports the learner as an individual and which incorporates approaches to learning which are interactive and reciprocal rather than didactic; approaches which include establishing relationships and which incorporate choice and learner driven learning. In this way, I attempted to use my practitioner

experience to aid my understanding. Madison (1988:28) suggests that, 'far from supplanting personal, subjective judgement, or eliminating the need for it, it is meant as an aid to good judgement.' In keeping with this view, I did not attempt to retain objectivity as a researcher. However, my engagement in the research was aimed at extracting, analysing, clarifying and challenging my conceptualisation of practice.

The research questions were extended to investigate whether key aspects of organisational culture could be identified as necessary for the implementation of the type of curriculum advocated, ie a curriculum supporting the 'key themes': (1) relationships and communication; (2) tailor made learning (including relevant learning and progress, structure and flexibility); (3) learner control (learner-led activity, motivation and choice). Was this emphasis applicable and desirable in different settings? Would it support the stated goals and philosophies of the wide range of organisations involved in working with adults with profound and complex learning difficulties? What are the barriers for successful implementation of these types of practices? Could the design of the curriculum and the training linked to it help to overcome the barriers?

As the study developed, I started to conceptualise these various elements as an interconnected, complex and dynamic interweave: individualised learning and the curriculum; tailored teaching approaches and organisational culture; individual staff behaviour and organisational management. My focus shifted, this time examining again my early notes regarding the ways in which learners experience quality and the key role of each member of staff in this interactive experience. This led to a focus on

the development of each member of staff in terms of their holistic maturity/development, ie both their functional skills and knowledge *and* their emotional intelligence and the interdependence of organisational culture, management and practice with individual staff's holistic maturity, enabling each learner to experience tailored quality.

The Research Process

'Idiosyncrasies of person and circumstance are at the heart, not the periphery of the scientific enterprise' (Bell & Newby, 1977:9). This notion that we are inevitably influenced by our own 'existing concepts and theoretical positions' (Watson, 1996: 44) is certainly clear in the process of discovery I underwent during the study. The range of methods used in this study is interesting in itself, in that it illustrates the way in which I constructed and modified the study as it progressed. I started with a survey and an approach to analysis which has been described as based on 'standardised, often mechanistic procedures' (Coffey & Atkinson, 1996). In spite of its limitations, discussed further below, this starting point enabled me to tackle the highly complex task of piecing together the multiple strands of work with people with profound and complex learning difficulties and disabilities by constructing and testing factors of influence layer by layer until, at the point of critical incidents analysis, I begin to merge the influences (curriculum structure and content, pedagogy, organisational culture) into a more holistic exploration of the notion of quality provision for these learners.

As a novice researcher, I endeavoured at the outset to keep control of the process and to 'test out' rather than 'delve in'. However, the issues raised by participants captured my interest and curiosity and, as I became more confident about exploring the complexities and methods for doing this, I became more willing to work with a less pre-defined structure. Exposure to post modern literature advocating practitioner research (Winter, 1991:477) was an important factor in enabling me to recognise the merits of utilising my experience to assist me in my research. Whilst I have attempted to organise the description and analysis of research processes in this chapter, it should be recognised that they did not emerge in the sequential arrangement of the headings. The process was structured, but involved recurrent and continuous checks, which were carried out using whichever method suited the check required.

'With the agreeable structuring of phase models should also come the discomfiting recognition that shifting contexts may mean that some processes are inherently discontinuous and open-ended' (Pettigrew, 1997:339).

The research process was qualitative in focus, since the main objective of the research was to examine complex human interactions from 'insider perspectives' (Ary et al, 1990) in relation to the social context of education for people with complex learning difficulties and/or disabilities. Taking Schwandt's (2000:192-195) descriptions of different theories of interpretive understanding, a brief example from the study is given here in order to demonstrate the attempts made to construct meaning eclectically with a view to providing a multi-dimensional understanding.

The first is 'empathetic identification' in which the researcher attempts to see, feel, experience and understand the 'actors' in the social situation. This can be seen as a feature of parts of this study, for example, in the observations of interactions and responses of learners with PCLD. The following is an observation recording, in which I am identifying with assumed feelings and perceptions of the learner:

S was dangling in the hoist, not so much looking uncomfortable but more looking anxious that something was going on. The manual handling consultant and the physiotherapist were handling carefully, but they were not using 'running commentary'.

As an observer, I was not only noting the events which occurred, but also my interpretation of the emotions and thoughts of participants, derived from my observations of their body language. Whilst ignoring these aspects would provide a functional description which would lack indicators required for raising questions about quality, recording my assumptions also potentially confines the notes to a set of perceptions filtered through my own paradigmatic bias. These issues are explored in the sections which follow.

The second theory described is 'phenomenological sociology' which aims to understand how we come to interpret and assign meaning to our actions and the actions of others. This is exemplified in this study by interviews relating to critical

incidents, in which the researcher and the interviewee are engaged in discussion of meaning:

N: J came in wearing a tee shirt with 'bitch' written on it. I sent her home to change and told (manager) afterwards.

C: What did you say to J?

N: I told her that it was not appropriate to wear at work. She was really annoyed with me. I think she thought it wasn't ok to comment on her clothes. I pointed out that some of our students can read it and repeat it etc. (shrug)

C: You didn't ask (manager) first?

N: We all know here that it's for the students. Not personal. (Manager) said, 'Quite right!' J needs to understand it and always do it, not go off on her own little planet, not thinking. This is work. We're here for the students.

This extract demonstrates the role of organisational culture (discussed in Chapter 1) in creating and defining participant behaviour. N was confident in his role, because there is clarity of expectations. He was not rationalising his action in terms of his opinion of the tee shirt per se, but in terms of the potential impact on the learners.

The third theory is 'language games'. This theory considers the role of language in shaping and understanding systems of meanings, or 'verstehen', within an organisation. Even at the initial survey stage of this study, the different use and interpretation of words such as 'relationships' (between learner and staff) was noted, especially between sectors in which relationships with learners were considered by some as 'a professional but sensitive interaction' and by others as 'getting on with

each other'. This distinction in use of language may be attributed in differing ways, but in the course of this study, my focus became the development of holistic maturity which enables staff to be more responsive to individual learners. These differing comments later prompted further probing, which indicated that the latter comment was said with a particular relationship in mind and referred to the emotional responses of both the staff member and the learner, whereas the former comment referred to relationships more generally and reflected the staff member's view that it was his responsibility to 'find a way to make (the relationship) work'. This example demonstrates the way in which this study attempted to layer the complex interplay of people within the dynamic social environment, by identifying recurrent key themes and then delving further into understanding how each person experienced and interpreted the activities within the key themes. The issue of language is explored further in the section below and in Chapter 3 (Results and Discussion).

Although aspects of these theories are apparent in the study, I do not claim to have assumed objectivity in these interpretations. I do not consider this to be possible, especially since I am a practitioner and one of the organisations featured in the study is the one in which I work. Instead, I made my practitioner preconceptions a part of the process of enquiry, a philosophical process described by Schwandt (2000:195) as 'engagement of one's biases'. In some cases, I was also involved in planning and facilitating 'training' (refer to section on focus groups) in order to progress an agenda within the organisation for changing organisational and teaching practices. This seemed to me at first an uncomfortable role for a researcher to be assuming, although in keeping with Lewin's model of action research, advocated by Reid et al

(1987), which involves identification of a problem followed by planning of action to influence or change processes. In fact, this level of involvement enabled me to engage in both an etic and emic perspective and to witness and participate first hand in the emergence of 'ontological authenticity': new shared understandings.

Hammersley and Atkinson (1983:18) consider that 'behaviour and attitudes are not stable across contexts, and that the researcher may play an important role in shaping the context (which) becomes central to the analysis'. In fact, one of the participants in this study commented that, 'being observed makes me more aware of what I'm doing, even without you saying anything'. The focus of the research enabled me to engage the participants in critical thought about shared principles, practices and collaborative action to support the development of quality. Gill and Johnson (1991:108) comment that the nature of the research will be subject to the researcher's 'philosophical commitment to comprehending the behaviour of subjects in their natural and everyday settings through an inductive development of an empathetic understanding of those actors' rationality.' If I were to gain an understanding of the interconnections between the key themes, the philosophy and practice of quality and the organisational culture, management and leadership issues, it seemed that I needed to penetrate deeper into the organisation, but maintain an awareness that the resultant greater researcher participation was likely to engender influence as well as data (Burgess, 1984; Mason, 1996).

Advocates of practitioner research identify a separation of research and classroom practice in standard research, which they name as a major obstacle to enabling theory and knowledge to effect changes in implementation (Rose, 2002:45; Wilson,

1998:165). Stenhouse (1981:113) comments that all research, whether emanating from pedagogical theory or from extension of practical experience, cannot be applied without the teacher and may be accepted more readily if developed by teachers themselves: 'Researchers must justify themselves to practitioners, not practitioners to researchers.' Coleman (1999:169) argues for the selection of research approaches as appropriate to the purpose (improvement) and Cochran Smith and Lytle (1998:26) berate debates concerning efficacy of paradigms, and commend instead a focus on 'perspectives on knowledge that will ultimately help to improve educational practice'. The advantage of using practitioner research in the context of this study is that there was a direct and immediate impact between research and practice that took us a step beyond normal practice evaluation and action, by adding the ingredient of a set of questions arising from influences which were external to the organisation and which might be applicable to other settings. The distinction between evaluation and research, however, remains a 'grey area' (Mertens, 1998:2). Schein (1990:112) observes that 'if we combine insider knowledge with outsider questions, assumptions can be brought to the surface, but the process of inquiry has to be interactive'. Frost (2001:26) identifies the need to reach resolutions through engagement with the 'ideas and perspectives' of others in order to gain understanding. Certainly, the main advantage of engaging with the questions through practitioner research was that it was personally meaningful for the participants; like Ferguson's participants, those in this study often recognised that the research and practice were beneficially interwoven: ' . . . if educational research is to change practice for the better...It can only do this by operating through the minds and the understanding of practitioners' (Wilson, 2002b:143).

Action Research

In this section, I will provide an overview of the structure of the study and the approaches taken. In the sections which follow, I will examine further some of the methodological issues of each stage. Presenting the methodology in this way will enable me to explicate the detail of the study design and implementation, but it should be noted that the chronology of the study was not ordered in this linear way.

‘Good research is designed to fit the situation and purpose. In a fast changing world, that philosophy suits action research well’ (Dick, 2006:452). Much of the research activity within the three main participating organisations in this study relied on my ability to be flexible in the degree of ‘participation’ or ‘control’ I maintained. Most of the time, I assumed the stance of participating learner; seeking to be enlightened by the experiences and reflections of colleagues in the field, sharing my own perspectives or examples when appropriate. However, in some instances, in particular with senior colleagues, it was appropriate to engage dynamically, since they responded more positively to involvement which they perceived as ‘trying to help them’. It seemed that some participants initially wanted and expected me to take a role defined by Whyte (1991:9) as ‘professional researcher’ to ‘study a situation and a set of problems, to determine what the facts are, and to recommend a course of action’. In spite of this expectation, the study was highly collaborative, with the perceptions and mutually derived plan of actions of participants at the centre of the work. In keeping with Lewin’s view of action research (1946), as a teacher I could not conceive of a change process which did not involve all participants, including myself, learning and trying out new skills and knowledge. Establishing relationships with

participants and developing a honed awareness of the political and cultural context of each organisation were critical to gaining access to the type of information required. This is the subject of comment by Sense (2006:9): 'This consideration involved the researcher in assessing and possibly changing his 'research actions' to account for and contribute to the changing project context.' In one organisation, for example, there was a clear expectation on the part of the leadership that I would be involved and contribute to management discussions as they endeavoured to bring about organisational change. In another organisation, there was an expectation that I would be involved in discussion at a micro level, but there was no conceptualisation of how this might be related to management. Within these dynamic parameters, my role was consistent with a view of 'the action researcher being facilitator/contributor in a developmental situation wherein the researcher responds to provocations in the field rather than administers a prescribed research strategy' (Sense, 2006:11).

This process involved some development of skills on my own part. As the study progressed, I became more practised at gauging the best way to facilitate a line of inquiry which would be most likely to facilitate reflection and change action. I followed a similar application of facilitation skills as described by Wadsworth (2001). I started with the comments made in the survey, or from issues raised by participants and gathered information on the context. I then observed and/or discussed the issue and the underlying issues in a process of unravelling which Wadsworth terms 'compass work'. I avoided pronouncing solutions as 'an expert', but rather set up discussions and actions to explore mutually derived solutions. This was a particular challenge to my developing skills base when applied within my own organisation. But it had the

effect of helping many staff and managers to grow and in turn helped me to develop. For example, a manager continuously asked me for decisions about each step in the review of curriculum related to the key themes. But, after many discussions in which we engaged in joint problem solving (even if I thought I knew 'the answer!'), we reached a point at which he was identifying the issues concurrently with me and ended by making a set of recommendations, for example changes to the formatting of Individual Learning Plans, which were based on his discussions with others and which were far more incisive and well conceived than my own ideas.

Wadsworth (2001:425) reflects on the capability of the researcher in ways which correspond to the techniques of emotional intelligence employed in the study. He describes the importance of 'surfacing what is conscious and unconscious, discussable and undiscussable' using the metaphors of a mirror and a magnifying glass. In the example of the manager's development, the issue which we had discussed for action research purposes was the need to increase the skills of the management team to reflect their changed roles during a period of rapid growth, so the research issues in this part of the study were layered and complex, and the re-design of Individual Learning Plans was a transformative moment in relation to the focus of teaching and learning; but also it was a moment of transformation for the manager which had further impact on his subsequent development, on his status and influence, on his relationships with myself and others and eventually on his job role. We had engaged in 'scaling-up the system' and 'charting the new territory' (Wadsworth, 2001:424) by considering the systems and structure requirements of growth and identifying the elements which needed to develop and the elements

which needed to be protected which were threatened by change, such as the emphasis on staff involvement at all levels. The Individual Learning Plan example was only one element, but it was a critical incident regarding change.

My aim was to 'study ... social situation with a view to improving the quality of action within it' (Elliott, 1991:69). My anticipation was that the research process would be intrinsically beneficial to learners by offering the participants and the researcher an opportunity to develop through increased information, reflection and insight. Bradbury and Reason (2003:156) describe this as research which is

'grounded in lived experience, developed in partnership, addresses significant problems, works with (rather than simply studies) people, develops new ways of seeing/interpreting the world (ie theory), and leaves infrastructure in its wake.'

The intention to achieve these aims is reflected in the structure and management of the study.

The participants for this study were learners with PCLD, organisational managers, staff working hands-on as teachers, assistants, carers or support workers. Some had participated in the survey stage, some had not. Three main organisations participated: a special school, a specialist college and a day centre. Individuals, mostly managers, from other organisations also participated in interviews. The principles of the study were broadly consonant with those proposed by Wahlstrom

and Ponte (2005:548), namely that the reflective inquiry would relate to teachers'/managers' own practice and situation, based on dialogue arising from their own systematically gathered information and involving the learners with PCLD as an important source of information.

In the special school study, which took place over a period of one year, I first spent time in the school familiarising myself with the learners, staff and paperwork.

Teachers, assistants, managers and a governor were interviewed to identify their views on quality in general and their views of quality in their school and in their own practice. They gathered information from learners and colleagues based on the criteria for quality which they identified in the first interview. I carried out observations of all the teachers and two of the managers and used this approach to enable us to further probe the quality issues which they had raised and to identify developments and improvements to benefit the learners. I also fed into the group discussions, using the analysis of the key themes and critical incidents from the data as it emerged.

Some of this information was communicated by me directly, but most was fed in through participant initiated communication or, where necessary, through prompting the staff to highlight parts of their collected data. One of the key revelations from their research was that many of the teachers and one of the managers identified that they required individualised coaching to achieve some of their aspirations for improvement of practice. In addition, the managers' view was that the teaching practice within the organisation was patchy, in particular in relation to their core values. Whilst they were attempting to re-form the organisational culture, following the departure of the previous Head, the reflection of the culture in practice and the observed impact on

learners, was highly dependent on individual staff. This led to coaching activities taking place within the school and further evaluative interviews and observations.

The day centre study took place over three years. I familiarised myself with the organisation, in the same way as with the school, although in this organisation a greater level of relationship building was required to gain trust and openness. A similar approach was taken using interviews and critical incidents, and this was effective in eliciting data regarding organisational culture and key themes, but a greater level of involvement by me was required to assist the staff in the data gathering process regarding their own practice. I facilitated skills building in relation to observation of learners by carrying out some teaching myself to enable staff to experience observing their learners. This was also useful in that the staff learned to communicate about learners in order to instruct me as to how to work with them. This approach was strongly welcomed by staff and managers who transformed their perceptions of me into 'there to help'. This was in keeping with the culture of the organisation, which valued highly hands-on input to 'help'. The notion of time away from hands-on practice to reflect was very new to this organisation. Unlike the school, the managers kept distant from the study, in the sense that they did not act on anything which was discussed. They were extremely welcoming and they were greatly delighted with their perception of my positive influence on 'difficult' parents and staff, but they did not take this forward as managers. The impact of reflective inquiry at that time remained within the realm of two out of the three teaching staff with whom I worked closely.

The specialist college is my own organisation. The period of work for this study was four years, although much of the activity has continued beyond that period, but is not reported here. A similar structure was used, although with greater reliance on lecturers gathering their own data, since recording against criteria was a more familiar process within this organisation. I also used other managers to gather some interview and critical incidents data. This was beneficial in providing some evaluative opportunities for myself and in checking some of my findings and assumptions against those of others, albeit within the same organisational culture. A much greater emphasis on individual coaching of lecturers and managers took place in this study, since this part of the study emerged from the findings in the latter part. In addition, some practitioner research featured within this segment of the study. In relation to myself as a neophyte researcher and developing manager, it is pertinent to note that the study of the day centre took place prior to the one in the school and that the study in my College took place concurrently.

Further interviews and critical incidents interviews took place with participants, mostly managers, from a range of other organisations. These were some of the early 'follow-up' interviews in which I was clarifying and checking data from the survey and probing further into the perceptions of the key themes within a range of organisations working with learners with PCLD. Additionally, I conducted critical incidents interviews with other managers, to provide comparison with the data accumulated from the three main organisations and to provide some insights from other perspectives in an attempt to avoid becoming constrained by my increased emersion in the three organisations. 'In action research the distinction between researchers

and subjects may become quite blurred in the course of what is usually a lengthy, collaborative relationship' (Bradbury & Reason, 2003:157).

Figure 2.1 below is a summary of the participants in the study.

Notes referring to Figure 2.1:

- Organisation D denotes a range of participants from organisations other than the three case study organisations.
- Some of the participants listed under each data set are the same individuals.
- 'Teacher' denotes the leader of a session/class, in some cases termed a lecturer or day centre officer or tutor.
- The learner participation in observations and actions, often took the form of evaluative responses. However, leading and influencing behaviours were also noted (refer to Chapter 3).
- The composition of each of the headings listed in the data column are explained in the relevant headings in Chapter 2.
- 'Other professionals' includes therapists and health practitioners.
- 'Other Stakeholders' includes members of governing bodies, consultants and people from funding agencies.

Figure 2.1: Research Participants

Organisation	Data	Research Participants						
		manager	teacher	learning support assistant	learner	other professional	parent/ carer	other stakeholder
A: specialist college	survey	3	5	3	0	1	2	0
	interview	7	5	4	2	1	3	5
	critical incidents interview	7	6	8	3	2	4	3
	observation	4	5	9	18	1	3	0
	action	7	5	21	8	2	2	3
	total individuals (69)	7	6	23	19	2	6	6
B: special school	survey	2	2	1	0	0	0	0
	interview	3	3	3	0	0	0	4
	critical incidents interview	3	5	6	0	1	0	1
	observation	3	5	16	21	2	0	0
	action	3	5	16	5	1	0	1
	total individuals (53)	3	5	17	21	3	0	4
C: day centre	survey	1	1	1	0	0	0	0
	interview	3	4	8	6	0	4	1
	critical incidents interview	3	3	4	2	0	1	0
	observation	1	3	6	10	0	0	0
	action	1	3	5	2	0	2	0
	total individuals (33)	3	4	11	10	0	4	1
D: other	survey	2	5	4	0	3	0	0
	interview	5	4	2	1	0	0	5
	critical incidents interview	7	3	2	1	0	0	2
	observation	2	4	4	19	0	0	0
	action	3	7	14	0	0	0	0
	total individuals (64)	10	7	20	19	3	0	5

Altrichter et al (2002:128) comment on the issues of applying definition to action research and warn against overly constrictive definitions which could stifle its constructive and interactive potential. They attempt to reconcile the encapsulation of both 'intellectual clarity' and 'developmental orientation' by defining it both axiomatically: indicating what is meant, and empirically: by providing practical guidelines. In each of the sections of this chapter which follow, I consider both my conceptualisation of the process at each stage of the study and also the approaches to investigation and analysis used. Kemmis and McTaggart (2000:596) describe action research as 'a learning process' leading to change, represented by the Action Research Spiral.

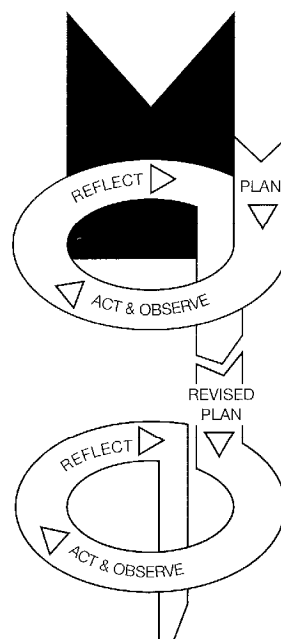
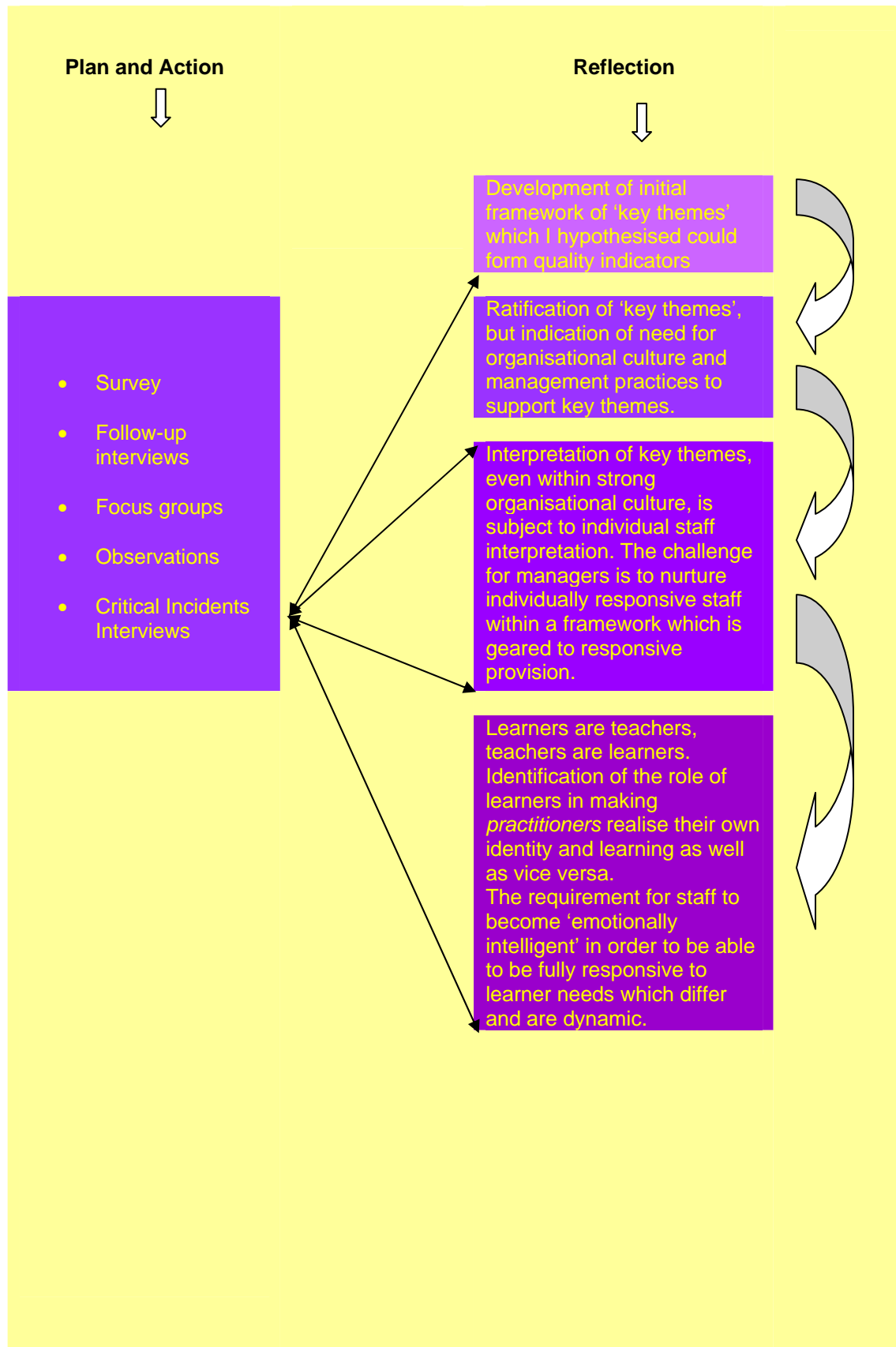


Figure 2.2: Action Research Spiral (Kemmis & McTaggart, 2000:596)

In developing the empirical action spirals within this study, my theoretical perspective expanded and vice versa, as depicted below (Figure 2.3). It did not happen in neat boxes and in a neatly defined sequential order as represented here and the

Figure 2.3: Expansion of author's theoretical perspective



conceptualisation process intertwined each element of the action to a degree at every stage. Nevertheless, this simplification of the process serves to demonstrate the impact of probing through trial and reflection towards a layering of understanding from an initial, relatively basic concept of quality indicators, to a notion of quality manifest through dynamic interplay within an organisational culture dedicated to the individual 'customer'. If I and others had not planned, acted, observed and reflected repeatedly, I might have been recommending a set of 'key theme' quality indicators, without reference to their encapsulation within the organisational culture, or the need to focus on individual staff and their development of holistic maturity as prerequisites for the operation of the key themes.

Constructivist Grounded Theory

In the first stage, a survey approach was chosen as a means of eliciting opinions from a cross section of participants (from different sectors) on the relevance, clarity and usefulness of the draft curriculum framework. The framework was based on the developments and practices established within my own specialist college and was due to be published within a specified time span. Participants were identified by an 'expression of interest' form which was distributed to all carers and professionals encountered at conferences and workshops during the four months prior to the survey. From the responses, participants were selected randomly from each sector (eg voluntary, education, social services). A mail survey was chosen to allow respondents time to read and reflect on the material before responding and to encourage interaction with the material rather than the researcher. It was not my intention here to disengage from the process, but I wanted to ensure that the

participant was responding to the draft chapters as a future reader would, rather than to engage in a person-to-person discussion which would bring in the added dimension of social interchange. Coleman (1999:142) notes that questionnaires allow for 'time and space for respondents to consider their answers in privacy and at their leisure'. The 'expression of interest' was used in an attempt to overcome the disadvantage of mail surveys which are generally associated with lower response rates (Mertens,1998:109). However, this meant that some participants had heard my presentations at conferences, which might affect their responses in a number of ways: they might be influenced by notions of professional status which might make a questionnaire preferable: 'It is easier to answer a questionnaire than to be interviewed by the Principal!' (Coleman, 1999:142); secondly, they might have gained a greater understanding from the presentation than from the writing, which could be beneficial if they were able to analyse and identify the shortfall, or it could be detrimental if they were to assume that clarity was found through the text alone.

The initial survey (Appendix 1) aimed to elicit some basic data concerning the respondent and contained some open questions designed to gauge key areas of importance to each respondent. Coding of responses provided an initial framework from which the key themes emerged and informed the design of questions for follow-up interviews. I used grounded theory analysis to organise and probe the comments from participants. I also used grounded theory to dissect and inform deductions arising from 'comments', often in the form of non verbal indicators, from learners with PCLD (discussed further below). Similar comments from the survey participants were grouped and coded as concepts. Comments were coded into categories. For

example, all comments about the relationship between learners and teachers were coded 'relationships' and then subdivided into further categories if appropriate. So, sub-category 'relationships: power' encompassed comments such as those about learner control, attitudes towards learners/teachers, use of behaviourist or interactive approaches. Using this technique, I was able to identify common themes identified by participants and express them conceptually as 'key themes'. Seale (1999:89) describes this process as 'constructing a theoretical language grounded in instances of data.' Glaser and Strauss (1967:6) claim that a strength of grounded theory is that the theory emanates from data rather than from 'logically deduced a priori assumptions'. One of the benefits of the approach for this study has indeed been to generate 'conceptual categories' (Glaser & Strauss, 1967:35) which could be analysed comparatively against the key themes identified within the literature (refer to Chapter 1) and against the influence of my own assumptions, derived from my experiences as a practitioner. This approach sits comfortably with grounded theory's association with symbolic interaction and its commitment to methodological assumptions that the researcher will engage in first-hand empirical research and engage in developing interpretations and theory which 'is handled and modified through an ongoing interpretive process' (Locke, 2001:22).

As a practitioner, I was approaching the research with some preconceptualisation of the issues drawn from experience, but I used the different methods of survey, interview and observation to enable me to engage, check assumptions, re-engage at a more detailed level and to develop theory about the potential for improving the

quality of provision for learners with PCLD. The use of grounded theory for this type of work is not unusual. Denzin (1994:508) states that,

‘When one peels back the layers of discourse embedded in any of the numerous qualitative guides to interpretation and theory construction, the core features of the Strauss approach are present.’

The nature of the research topic fitted with the definition offered by Strauss and Corbin (1998:11) in that it is about ‘...lived experiences, behaviours, emotions and feelings, as well as about organizational functioning.’ However, as the research developed, I was increasingly driven towards investigation of the attributes of staff who seemed able to work with learners in an outstanding way. Their interactions were almost magical to observe, their responses to questions demonstrated mature and thoughtful commitment to continuous improvement to benefit learners. I began to consider that I should not focus on the various techniques which are consistent with the reciprocal, interactionist approach, but the holistic maturity, including emotional intelligence, which enabled people to adopt the techniques successfully. This investigation required more in-depth data and led me to combine methods and analysis in an attempt to handle investigation of complex traits. Therefore, my use of grounded theory was as a pragmatic approach to the organisation and analysis of emerging data. Unlike hypothetico-deductive models of research, grounded theory allows for definition of concepts arising from empirical observations.

‘It appears that many management and organization researchers have selectively taken up grounded theory’s logic and procedures, adapting and integrating them with the logic and practices from other qualitative analytic styles’ (Locke, 2001:viii).

Further comment regarding process orientated/narrative theory is examined in the section on interviews and critical incidents below. However, it should be noted at this stage that from the outset I had anticipated that I would be examining practice strategies and identifying which of these in combination or in some form create quality practice for each student with PCLD. In the process of the study, this preconception was immersed in a more complex set of conceptualisations. The teaching approaches were indeed one indicator, but they were an indicator based on the prerequisite that staff had developed holistic maturity, enabling them to operate the approach effectively. At the survey stage, I was assuming that I would be creating codes for the study, but in fact these initial codes were later subsumed in the altered nature of the investigation.

Glaser and Strauss (Glaser, 1965; Glaser & Strauss, 1967), describe four stages of analysis in grounded theory development. These are not linear stages. Within this study for example, coding was originated at the point of analysis of survey response. However, additional coding as well as re-coding took place at later stages following analysis of interviews. The first stage refers to comparison of incidents in each category. The researcher is asked to suspend or ‘bracket’ (Rennie, 2000) her preconceptions in order to allow concepts and theories to emerge creatively from

data. During this stage, the researcher is engaged in coding or naming and comparing data elicited through a range of processes, such as observations, interviews, desk research. This coding enables the researcher to create draft conceptual categories and to clarify perceptions of data through comparison, as well as to provide a language for the conceptualisations revealed. In the process of 'memoing' (Locke, 2001:50), these emerging categories may be recorded to support the tracking of development and inform subsequent drafting of conceptual categories. Some of my early stage memoing included aspects of the concepts which I later used to structure the writing of the key themes such as: 'building relationships', 'tailoring learning'. Later, in the critical incidents, for example, my conceptual categories featured personal development attributes: 'constructive awareness', 'open and egalitarian', rather than processes or approaches per se.

Stage Two of grounded theory refers to analytical activities which integrate categories and their properties. The match between component properties and categories is examined and categories are considered as related parts of a whole conceptual entity. I started to conceptualise quality provision for learners with PCLD in the form of a geometric lattice which enmeshed organisational culture, organisational structures and teaching approaches with individual student and staff interactions, perceptions and self development.

I was conceptualising the learner at the centre of a complex interweave or network in which the 'atmosphere' within the space (learning environment) equated to the organisational culture. The organisational culture could 'materialise' as artefacts, as

described in Chapter 3, but essentially it is an empirical phenomenon. Within this organisational culture, there are a range of organisational structures, systems and processes which are a reflection of the culture and encased within it, and yet are also able to influence and change it as they are developed by the organisational members. Teaching approaches may be part of this reflection, in that they will be



Figure 2.4: Organisational web-ball

subject to the organisational culture, but they are also subject to the perceptions and self-development of the teacher. The study identifies this as a point of tension in which some individual staff may be insufficiently self-developed to be able to put into practice the strategies required to operate the organisational culture. For example, even if the organisational elements are well developed to facilitate tailored learning,

and training in appropriate teaching strategies has taken place, a member of staff may not have developed sufficient self awareness or 'relationship management' (refer to Section 4 of Chapter 1) in order to implement the strategies in a manner which is responsive to the individual needs of the learner. It is interesting to note that some staff cite individual learners as being critical to their self-development, not only in relation to the development of their teaching strategies, but also in supporting their personal development. One member of staff commented that a particular learner had helped him to 'confront my fears about losing control and looking ineffectual'.

From this visual image, I began to conceptualise the whole, but with a particular spotlight on the capacity of individual staff and learners to reflect and affect each aspect of this whole depending on her/his state of development as a person. In turn this raised the spotlight back to the whole, in examining the potential for supporting and enabling staff to attain states of personal (hand-in-hand with professional) development, or 'emotional' and other holistic maturity, in order for each staff member to behave in a way which corresponds to the learning and support needs and potential of each individual with PCLD. This reflects Stage Three of grounded theory, which is described as 'delimiting the theory' (Locke, 2001:52). This is the stage at which the categories are sufficiently developed so as to already cover any new data collected and the researcher is able to make a decision about the focus of the theory, in this case the focus on organisational culture and processes linked with holistic development of staff and learners. This reduction decision determines the choices made of what to include and what to drop from the theoretical framework, resembling the spotlighting process I described above. In a sense, this unfolding

story is infinite. It is a process which can never be totally complete, but which can add to our knowledge and development when the theoretical framework facilitates analytical insight. This model of a process of continuous comparison, discovery of categories leading to conceptualisation and theory building, reaches Stage Four when the researcher uses the coded data, memos and theorising to form the writing of the theory.

A frequent criticism of the application of grounded theory is that it is sometimes claimed to be used when in fact the researcher is simply reporting 'common-sense categories' or engaging in general qualitative analysis (Melia, 1996: 376). Cutcliffe (2005:423) posits that 'the most illuminating qualitative findings go far further than description: they interpret, they explain, they solve problems'. During the process of 'constant comparison' (Seale, 1999:96), I was able to extrapolate the data into concepts, examine inter-relationships between some of the concepts and map these against the common themes found in the literature (refer to Chapter 3). It was a process of clarification of shared understandings, which provided me with a baseline for delving further into examining how the subtle and complex issues underpinning the categories are perceived indicators of 'quality' in this context, and how these might be developed, nurtured and sustained.

The information held within the survey process was insufficiently detailed and often quite superficial, so further investigation was required in order to probe beyond the categorisations. Glaser and Strauss (1967:45) state that the 'process of data collection is *controlled* by the emerging theory'. In order to build on this information

and develop my theory that the 'key themes' raised by participants could be equated to quality indicators, I needed to follow up some of the comments from the survey in more depth and from this newly emerging theoretical perspective. At this next stage, my approach was theoretically driven, in the sense that I was keeping in mind the emerging key themes when conducting the research. At later stages, when considering critical incidents for example, I was much more selective about focussing on data which was relevant to the developing theory: a process described as 'theoretical sampling' in the grounded theory approach. By gathering data through participation in different ways and across different organisations, I was seeking to ascertain the similarities and differences by continuous comparison. This process is considered to be an essential feature of grounded theory enabling fuller conceptualisation and credibility (Locke:60). Throughout, I have indicated that I was not only seeking to understand what is quality provision for learners with PCLD, but I was also aiming to illuminate how it is or may be developed. The intention to create theory which may be pragmatically useful is again a feature of grounded theory. I recognised that 'quality' is unlikely to be a single solution or approach and that it could be manifest differently in different organisations, with different individual learners, staff and others, and that it could be dynamic, requiring re-definition on an ongoing basis. As Thorngate (1976:134) states, 'The impostulate of theoretical simplicity dictates that we shall never see a general, simple, accurate theory of social behaviour.'

As the research developed, I began to move away from a relatively simple set of quality indicators to considering how they were manifest and how they came to

occur. This led me to the question of staff competencies and their individual and collective abilities to relate to individual learners and events, which resonated with the quality indicators, or 'key themes', as I named them in Chapter 1. It also raised issues of how approaches such as person centred planning might be used as structures to enable learners to be partners in the processes of organisational development. The focus on management and organisational culture in facilitating the growth and nurturing of these attributes and skills or holistic maturity in staff, was an example of theoretical sampling. I could have focussed on an individual or interaction specific theory; instead I chose a management and organisational culture route. However, all of these aspects of enquiry may be found in the data to some degree and it seemed that the further I delved, the more complex the data became and the more I needed to create theoretical hooks on which to hang it and make sense of it. Weick (1999:802) confirms 'every time people learn something, they become more complex - a response that enables them to maintain self-regulation in a complex environment'.

I have used the title 'constructivist grounded theory', since there is some debate about the nature of grounded theory. The approach assumed here resonates with Charmaz' (2000:521) definition:

'A constructivist grounded theory assumes that people create and maintain meaningful worlds through dialectical processes of conferring meaning on their realities and acting within them.'

It differs from early grounded theory work in rejecting associated positivism in favour of an emphasis on multidimensional construction of meaning. This approach does not view data as revealing meaning, but rather that perceived reality arises from interactive processes, which leaves theory open to further refinement.

Follow up Interviews

The survey and parts of the interview data provided some interesting baseline information and some signposts to key areas as perceived by the participants. However, I needed to probe further in order to check my interpretations of the information, to find out whether participants and I were attaching the same or different meanings to the words they used to describe quality in the area of study and to identify the extent to which participants viewed themselves and their organisations as successful in achieving quality in the key areas. I also wanted to find out whether those participants expressing agreement with the principles had been successful in implementing them in practice, and what criteria they were using to reach this judgement. I selected interviews as an appropriate method for gathering this information. Interviewing as a process of storytelling (Seidman, 1998) seemed an appropriate way of hearing participants reflect on and ascribe meaning to practice which would enable me to elicit the information I required. 'If given a chance to talk freely, people appear to know a lot about what's going on' (Bertaux, 1981:39).

A disadvantage of the coding approach used, as described above, was that in the process of attempting to organise the data I was in danger of simplifying it into 'occurrences':

‘The coding process eliminates narrative voice... There is no particular effort to recover or explore the details of the moral contexts that give the events meaning for the participants’ (Pentland, 1999:714).

Through interviews, I gained more details and context for the ‘key themes’ identified, but also I explored the connection between these key themes and organisational culture and management.

Although I had identified the line of inquiry, or purpose, of the interviews, I used an ‘unstructured’ style of interview and attempted to engage in a ‘real’ conversation, rejecting ‘traditional’ distanced techniques of interviewing (Fontana & Frey, 1994:371). In this sense, I followed a ‘feminist’ style and did not endeavour to remove myself from the process in an attempt to make it objective (Adler & Adler, 1994: 380). However, Haves (1990:157) observes the difficulty that the researcher’s views, benefiting from the clarity arising from ‘reading round the subject’, should not dominate. For the most part I aimed to confine my input to my perspectives or anecdotes which complemented those expressed by the interviewee; I followed rather than initiated ideas in the conversation. Seidman (1998:74) advises that when an interviewer’s experience connects with the participant’s, ‘Sharing that experience in a frank and personal way may encourage the participant to continue reconstructing ... in a more inner voice than before.’ This was not an objective process, but a participatory one:

‘Increasingly qualitative researchers are realising that interviews are not neutral tools of data gathering but active interactions ... leading to negotiated, contextually based results’ (Fontana & Frey, 2000:646).

I encountered a number of difficulties in the process of the interviews. My professional role meant that I had relatively easy access to participants and most were not reticent about being interviewed. However, the degree of openness and forthrightness amongst participants varied considerably, and I was aware that my perceived authority made some participants more guarded. I learned to pay particular regard to my own voice and body position and to adapt my style of questioning to sound more or less discursive or formal according to the needs of the respondent.

Researchers vary on their views of interview ‘rapport’. Like Phoenix (1994:57), I subscribe to the assumption that the relationship is limited, but that the interview will be more informative holistically if it assumes a ‘warm and reciprocal’ process. Interviewing, for example, for recruitment, for supervision, as part of engaging wider partners, is a familiar part of my professional role, and so I was not surprised to find that the interviews for this study challenged me to analyse my ontology and practice, as well as offering insight into the views and challenges of the interviewees. During interviews, I noted my responses as well as those of the interviewee and found that in most instances, there were moments in which we were able to ‘connect’, even when the views of the interviewee were generally very different from mine. For example, a carer, whom I found irritating, spoke of learners as if they were another species and of staff as people who were to be admired for their altruistic virtues. But

during a part of the interview, she described her learner's response to 'crackly Christmas paper', and her feelings about this moment, which gave an insight into her underlying motivations as a carer and enabled me to find a momentary connection with her, which Luff (1999:694) would describe as a 'moment of rapport'.

Studies by Clark, Drew and Pinch (2003) mirror some of the changing emphasis of my focus on interviewees. Their studies of salespeople and clients reveal ways in which interactions may be managed. In their study this management of interactions related to the use of 'agreements' and 'affiliations'. They analysed interactions in relation to the use of affirmatives and statements of agreement as a means of creating a rapport. They found that this occurred when the salesperson was able to make a comment which showed convincingly an affiliation to the viewpoint of the client. I found that note-taking could easily become a barrier, since it restricted my ability to gesture and perhaps leant perceived formality to the discussion. So, I adopted a strategy of commencing without notes and then finding a point as early as possible when the interviewee made a comment to which I could respond non-verbally so as to indicate 'Ah, that's a really good point, I'll note it down!' After this the note-taking appeared to create less distraction. In addition, I became better skilled at managing to write, make eye-contact, nod and frame questions or comments, simultaneously. My notes on interviewees' non-verbal communications, levels of confidence during the interview and their ability to analyse the underlying motivations and drivers of the people and events featured in their narratives, contributed to the shifting of focus within the study towards individual self-development within, and as a part of, the organisational culture. This reflects a view of the interview as a form of

storytelling which reveals not only the action, but the narrator's view or awareness of how the story evolves. At this point in the research process, my focus was organisational culture and management, so the 'storyline' I was attempting to elicit from the interview discussion was anything the participant had to offer in relation to these areas. One theme which recurred in the interviews within two of the organisations in the study was the unprompted repetition of stories which were illustrative of particular aspects of the organisational culture. In both organisations, participants frequently explained their knowledge of the organisational culture in terms of domains which were frequently narrated within the organisation, often attributed to a particular key person in the organisation in the same way as a novel uses the lead character. It seemed that nearly everyone was familiar with the story and they gave very similar interpretations of the cultural meaning of the story. For example: 'He's got the experience, y'know. He knows (student) and is so there for him. That's what we're here for.'

These observations prompted consideration of whether narrative was being used within the organisations to reflect, develop or promulgate organisational culture. I was able to delve further into this question through analysis of the interviews with managers, some of which indicated some deliberate transmitting of organisational stories as part of management strategies, especially stories relating to successes of individual learners as motivational strategies. I also identified some patterns within organisations which indicated use of informal reporting as a mechanism for reflecting the organisational culture. Feldman and March (1981:176) consider the role of informal reporting as a form of surveillance of organisational events, 'a thermostatic

linkage between observations and actions'. In this way, I was able to identify from the anecdotes during interviews some key features of the organisations, and in some cases I could trace the impact of actions and events from one interviewee's story to the next. For example, in the organisation whose previous leader was known for listening in on conversations through the intercom system, I was able to track several people's stories about this action and several possible outcomes. Some participants gave interpretations of the action which provided insight into the role of this story within the organisation at the time and the way in which this same story was being used to assist change arising from the departure of the leader. O'Connor (1997:305) draws together narrative and organisational decision making and argues that narratives influence decisions and actions over time, suggesting that stories are 'a force in themselves'.

One significant difficulty in interviewing was the differences in meaning attached to language used by participants from different sectors and my own use of language in framing questions. Flanagan (1954:341) comments that 'a slight change in wording may produce a substantial change in the incidents reported'. He gives an example in which the question 'Tell just how this employee behaved' elicited comments regarding personality, whereas the question 'tell just what this employee did' produced a much broader range of answers. Although I am accustomed to working collaboratively across sectors and therefore I am familiar with many of the different terms used, my attempts to check shared meanings showed that some shared terms held different meanings for participants. Fundamentally, there was quite considerable difference in what the words 'learning', 'teaching' and 'education' meant to

participants, in the context of learners with profound and complex learning difficulties. Some participants clearly indicated that they defined these terms in relation to literacy and numeracy skills, in fact literacy and numeracy in narrowest definition, whereas others used the same terms to encompass a much wider, holistic concept of learning. Many participants' perceptions fell part way between these views, but it is interesting to note that it was not necessarily those who are employed in the education sector who fell into the category of those with the broadest definition of learning.

There were also terms, such as 'inclusion', 'age appropriate' and even 'choice' which were used by the participants and clearly evoked in them strong political and/or emotional views based on their experiences as practitioners¹. This often resulted in differentiated interpretations of the words arising from personally derived connotations. For example, the notion of 'inclusion' for one participant from a specialist provision, was associated with her perceptions of people in authority using learners for political gain under the banner of 'inclusion'. This association not only resulted in a negative stance towards inclusion but had, in effect, created for her a narrow definition of 'inclusion' which seemed closer to the way in which I would assign meaning to the word 'integration', rather than 'inclusion'. Gadamer (1975) points out that in use of language, we are engaged in translating or decoding the meaning of the other person and using it critically to develop our own understanding. He cites an essay by Heinrich von Kleist about examinations which involved spot questions which candidates must answer instantly:

¹ Practitioner is used here as a generic term for all people engaging with the learners, including carers, therapists, teachers.

‘Yet, as we know, only fools can answer questions whose answers are known to all and sundry ... Computers and parrots can give ‘exact’ answers more quickly’ (Gadamer, 1975:497).

In this comment he was indicating that it is the thought process integrated with the use of language which results in appropriation of understanding.

This notion was an important pointer for guiding me to consider the development of holistic maturity of individual staff, which features later. The use of language and communication in the building and reflection of organisational culture has been the subject of several studies (Pacanowsky & O'Donnell-Trujillo, 1982; Cushman, 1977; Spradley, 1979), reflecting the close relationship between organisational culture as symbolism and the use of words and non-verbal communication as cultural symbols. Schall (1983:559) suggests that interactions between people within an organisation shape shared meanings, which eventually ‘become accepted, even assumed’ and are conveyed to new members of the organisation ‘through modelling, instruction and correction’. In this sense, the capturing of semantic differences was relevant in highlighting key issues.

A further difficulty I encountered with the unstructured interview was that the exploratory, experimental nature of the process at times created crossroads at which I was required to make a decision about whether to intervene and guide the discussion back to the line of inquiry, therefore achieving its purpose, or whether to flow along with the participant towards uncharted territory. In most cases, both of

these phenomena occurred. The uncharted territory discussed was often related to the organisational culture and management issues which I subsequently elected to explore further in the critical incidents interviews but, although there was overlap, at the stage of conducting the first set of interviews, I felt that I was not sufficiently prepared to know how to progress into this new territory. On reflection, if I had allowed the time and been more open at this early stage, I could have taken this further and used the notes and transcripts as the basis for the next stage - critical incidents.

In order to begin analysis of interviews, I formulated a matrix in which I documented the participant comments, grouped in 'content themes', 'practices' and 'artefacts' as 'a prompt for deductive theorising' (Martin, 2002:127) in relation to organisational culture. The three perspectives outlined in Section 3 of the literature review needed to be taken into account when using this method of analysis. In particular, it was important to be aware of my own, or 'home perspective' (Martin, 2002:121), which emanated from my own view of my own organisational culture. I attempted to heighten my awareness of the analysis provided by some participants in order to record ambiguities and paradoxes and, in particular, to note the usefulness of switching perspectives as recommended by Schultz (1991): 'A cultural portrait is more complex and inclusive if a culture is regarded, at any single point in time, from all three perspectives.' An interesting tension emerges here. Perhaps because I am a manager of an organisation, I tend towards an integrationist and sometimes differentiation perspective in practice, although in theory my thinking was that the three perspectives combined must give a more complete picture. In order to facilitate

achievement of a more holistic analysis, use of the matrix ensured that I noted the materialist aspects of the organisational cultures investigated, as well as the ideational aspects which were my key focus. For example, in considering the theme 'tailor made learning', I noted in one matrix that there were formal practices identifying tailored learning needs, but that the physical arrangements created low staffing levels within the groups.

The interviews resulted in more than the information I was seeking. Some of the participants' comments revealed their perceptions of barriers and difficulties associated with achieving quality in the key theme areas (tailor made learning and progress, structure and flexibility; relevancy; relationships; communication; learner control, motivation and choice), which led me to investigate organisational and cultural issues. This line of enquiry produced some very interesting and engaging narrative, and it was the analysis of this that led me to focus on the self development, or the development of holistic maturity required by individual staff to respond to individual learners and learning situations, which included reference to notes from these follow-up interviews too.

Critical Incidents and Critical Hermeneutics

The first phases of this study had provided some insight into the participants' concepts of quality, both in relation to the construction of the curriculum and its implementation. Key themes were emerging: (1) relationships and communication; (2) tailor made learning (including relevant learning and progress, structure and flexibility); (3) learner control (learner-led activity, motivation and choice). However, it

was clear that many participants were reflecting on barriers and difficulties in achieving quality in the key theme areas. My intention was to explore this further, with a view to identifying the organisational elements which facilitated achievement of quality in the key theme areas.

Process focussed theories have been adopted by some researchers in organisational management (Pentland, 1999; Pettigrew, 1977; Langley, 1999). Pettigrew (1997:338) defines process as 'a sequence of individual and collective events, actions, and activities unfolding over time in context'. This focus allows space for capturing the dynamic flow of organisational events, perceptions and interactions, the underlying features which shape them and deductions regarding outcomes. However, this emphasis on unfolding events within context potentially limits the research view to that of the particular context of study. I used interviews in order to facilitate knowledge of this unfolding of events and to probe participants' perceptions of the way in which their organisation supported their work and used the technique of critical incidents analysis to unravel the 'taken-for-granted' aspects of the organisations' functioning.

Several methodologies have been employed elsewhere for eliciting information about organisational culture, but there is a lack of agreement as to how to assess, or even how to define, culture (refer to Chapter 1). Tucker et al (1990) recommend the use of questionnaires in ascertaining information regarding explicit beliefs and values; others recommend qualitative investigations reflecting a perspective that stated and actioned values may be significantly different (Schein, 1985; Wilkins & Ouchi, 1983).

Locatelli and West (1996) describe a comparison of use of repertory grids, twenty statements tests and group discussions in relation to investigations of organisational cultures. Their experiment showed that the former two methods were helpful in accessing cultural information in terms of statements regarding values and meanings. However, this was the type of information I had already started to collect from the earlier phases of the research. The potential advantage of critical incidents was that it might enable me to gain insight into multiple realities and dynamic reflections, but the critical incidents approach requires some ethical consideration of ways in which information collected may be disseminated.

The process can raise sensitive issues about individual beliefs and assumptions which may require careful presentation, given that an organisation's managers may not necessarily subscribe to the acceptance of multiple realities or critical friend analysis and support (Ingvarson, 1986). Tripp (1994) raises this issue in relation to biographical research. He suggests that the use of critical incidents for reflective practice is more focussed than the use of biography which may publicly expose the individual inappropriately: '... the investigation of people's lives is necessarily the investigation of the people themselves' (Tripp, 1994). In essence, this is why the measurement of organisational culture is problematic. In 'measuring' (Lewis, 1996) organisational culture, we are seeking definition to phenomena which are complex and in a permanent state of subtle change, because they are moulded and remoulded by interactions and events. So, instead of measuring organisational culture, researchers have identified components of culture which can be explored and monitored for change. Hofstede et al (1990), for example, use symbols, heroes,

rituals or 'practices' (how things are) and 'values' (how things should be) as manifestations of culture. In this study, I am in some respects attempting to transform this formula into a set of organisational culture quality components which appear to be prerequisites for implementation of the highly learner driven curriculum discussed in Chapter 1. However, the association between notions of 'quality' and 'culture' is also problematic.

Critical incidents technique is described as 'an in-depth analytical description of an intact cultural scene' (Borg & Gall, 1989: 387). Critical incidents analysis has been used in a number of settings, including use as a tool for enhancing reflective practice in education (Francis, 1977; Angelides, 2001) by enabling teachers to question their practice through self-assessment of the determinants of their own and others' perspectives and actions, in reflection on a past situation or event. The approach is consonant with the notion of 'knowledge as personally constructed in social contexts' (Francis, 1977) and allows room for exploration of multiple realities through a technique of questioning of underlying values or 'forces'. Smyth (1991) developed a set of probing questions for a critical approach to supervision which have been amended for use by other researchers. For example, Angelides' (2001:28) questions:-

1. Whose interests are served or denied by the actions of these critical incidents?
2. What conditions sustain and preserve these actions?

3. What power relationships between the headteacher, pupils and parents are expressed in them?
4. What structural, organisational, and cultural factors are likely to prevent teachers and pupils from engaging in alternative ways?

Angelides describes the questions as 'a guiding map ... for probing into a critical incident'. Although I did not use these questions directly in framing the interviews (Fontana & Frey, 1994:370), I held in my mind the idea that these may be topics which could emerge from the discussion. In general, following brief explanation of the study and permission to proceed, I asked the participant to describe the work of the organisation and the general purpose (aim). I then asked for some good examples of when things had happened which should be encouraged and about examples when things went wrong or were not in keeping with the way things should be in the organisation (refer to Appendix 2). As suggested by Redmann et al (2000), I also asked about successful training and teaching interventions and used this information within the action research activities. However, I was not rigid in the application of questions; I used these areas of questioning as a framework, rather than a predefined process.

Bruner (1996:133) identifies features of narrative realities which are consonant with the constructivist paradigm and pertinent to the unravelling of this study through differing levels of meaning and complexity. He identifies narrative 'time' in terms of a series of unfolding events, rather than as defined by clocks. This perspective is interesting both in its potential illumination of the construction of reality by learners

who may have engaged less with time by clocks than others, but also is reflected in the stories by some of the participants, who were able to track developments in practice over many years through retelling of critical events and turning points. Bruner also notes the role of storytelling in enabling us to see 'what had never before been "noticed"' (1996:139), suggesting therefore that narrative offers a valuable insight derived from its ability to enable us to discern that which engulfs us. In considering the transmitting and embedding of culture by leaders, Schein (1992:237) suggests that critical incidents, and organisational crises in particular, reveal important underlying assumptions, and 'the manner in which leaders and others deal with it creates new norms, values and working procedures'. Denzin (1989:15) describes such critical incidents as 'interactional moments which leave marks on people's lives'. He suggests that these incidents 'have the potential for creating transformational experiences for the person'. The observation notes I made when interviewees described these incidents do not refute this notion. The nature of critical incidents mostly seem to have impacted on the interviewee in such a way as to prompt self-development, such as through greater self-awareness, or through challenging his/her previous conceptualisation or understanding.

The focus on narrative of critical incidents elicited information which held the potential to shed light on the ways in which stories contribute to the maintenance or evolution of the organisations. In selecting critical incidents as a core feature for examination, I was attempting to discover what types of interactions were transformational rather than just informative. A critical hermeneutic approach provided a useful overlay for analysis of the critical incidents derived from participant interview narratives. Critical

hermeneutics is a structured approach to interpretation of the symbolism of communications which enables consideration of who generated the communication and why - an important dimension in consideration of culture and management. The table below summarises concisely Ricoeur's 'moments' which form the basis of this analysis: social-historical analysis, formal analysis and interpretation-reinterpretation in which the former two are connected.

Characteristics	Description	Interpretive moment
Intentional aspect	Texts are not natural occurrences, but intentional acts of some individual or group.	Social-historical
Referential aspect	Texts are constructions that represent something, refer to something, or say something about something.	Social-historical
Contextual aspect	The meaning of a text is inseparable from the social and historical context of its production and reception.	Social-historical
Conventional aspect	As meaningful constructs, texts follow conventions of various kinds.	Formal
Structural aspect	The meaningfulness of a text lies in the relation of the elements that make it up. The relation is the text's structure.	Formal

Figure 2.5: Analysis of narratives (Phillips & Brown, 1993:1553)

The hermeneutic approach offered a way of analysing narratives whilst addressing some of my concerns about preconceptions and practitioner influence, mentioned earlier. Philosophically, hermeneutics allow for the potential of co-creation of

explanation. 'A narrative is not an objective reconstruction of life but of how it is perceived' (Wiklund et al, 2002:115). In fact, narrative itself is considered to be a form of hermeneutics as it helps the narrator to create meaning and shape identity. This viewpoint sits comfortably with the parts of this study in which the discussions led to trialling and reflection of different approaches to staff support and became a series of interactive narratives, involving comparisons of perceptions and co-created understandings. Additionally, Ricoeur's technique of 'distanciation' (1974:16) enables the researcher to de-contextualise the narrative by 'conquering remoteness' to some extent, enabling interpretation by bringing the past to which the text belongs into the present of the interpreter.

Structural analysis of the narratives provided a method of enabling this 'distanciation' and de-contextualisation. I examined the ways in which the narratives were presented and labelled them using metaphors, either those of participants or my own, to capture the essence of the plot in a summary format (Ortony 1975:49).

Understanding of the narrative can be aided by the development of metaphors contrived by the researcher to capture the essence of the narrative meaning. For example, the similarity of metaphors attributed to the participant narratives in one organisation helped me to capture the essence of lack of clarity of organisational mission there: 'lost at sea', 'blank map', 'busy doing nothing', 'empty vessel'. The use of labelling in metaphors provided the potential for me to recognise similarities and to re-think my initial assumptions regarding texts. However, the focus of metaphoric understanding on similarities limits its scope: 'When you use metaphor to understand

one thing in terms of another, you de-emphasise or even ignore the often considerable differences between them' (Hatch, 1997:55).

By using metaphors, I was attempting to extract the essence of the meaning in this process, because the headings of 'tailored learning' and 'relationship building' seemed inadequate in capturing the holistic nature of the elements described under those headings. The use of metaphors helps to bring these statements alive, making them vivid and communicating emotionally, sensorially and cognitively. 'A metaphor can often capture some of these distinctive, powerful, private realities that are tough to describe to someone else' (Weick, 1979:49). White (1973:426) identifies four types of presentation of narratives or 'dramas' as: romance, comedy, tragedy and ironic/satirical. So, as an example, the narratives offered by the participants whose organisation had recently changed leader and leadership style included 'tragedy' style from the participant who had felt that her behaviour had been adversely influenced by the previous regime and that she had been unable to control the legacy of feelings and actions from that time, and 'romance' style from the participant who narrated a series of changes she had implemented which had resulted in perceived benefits in overcoming the legacy of the previous leadership. This analysis enabled me to understand that change in the organisational culture in this case did not require each participant to hold a uniform view of the previous and new cultures. Whether their stories enabled reconciliation (comedy) or emerging awareness of roles (satire), resignation (tragedy) or winning through (romance), resolution of each participant's unique development issues relating to this set of circumstances and cultural perceptions could be achieved through many different routes or 'dramas'. This part of

the process of analysis was instrumental in pointing me towards consideration of the need for holistic self development of each member of staff, in support of each learner. This individual development would be affected by, and affect, the organisational culture, but even if the organisational culture embodied the key themes, their implementation requires each member of staff to be sufficiently developed to be able to apply them in a tailored way for each learner and learning situation.

Ricoeur (1974:17) asserts that understanding is not achieved until we are able to conceive of something in such a way as to change our home perspective: 'Every hermeneutic is thus, explicitly or implicitly, self-understanding by means of understanding others.' He terms this acquisition of new meaning 'appropriation'. It is the dialectic of 'distanciation' and 'appropriation' which facilitate understanding, which in turn holds a possibility to change human action. This notion became an important part of the study as I began to explore individual staff development and emotional intelligence. 'It is necessary to unfold the text, no longer backwards toward its author, but forward toward its immanent meaning and toward the sort of world which it discovers and opens up' (Ricoeur, 2002, 120).

Observations and Reflections

The best people to tell me whether the 'key themes' are relevant were the people with profound and complex learning difficulties themselves. They are the recipients, the 'customers'; their views are paramount. However, in addition to the difficulties documented for involving other groups of learners in research (Rose, 1999; Minkes,

1995; Jenkinson, 1993), this particular group have significant communication difficulties which require the researcher to consider a tailor made approach to eliciting their views. At this point, I started to have some difficulty in extracting the research question from the research approach. 'Tailor made' approach is also one of the key themes of this study. In deciding on methods for including the voice of learners in this research, I considered simultaneously the ways in which this is interwoven into the curriculum framework developed in my organisation (Allen, 2001: Chapter 2) and recommendations from the literature and study participants. This led me to identify the 'key themes', which I sought to test through observations and through analysis of student evaluation comments, as described in the next chapter. For the most part, I did not pose questions to learners; I viewed pre existing comments and searched for key issues to see if they were reflected in the key themes, in an attempt to avoid the pitfalls raised in the research literature arising from generalisations from snapshots of learner responses.

Lyons (2003:22) uses 'communication partners' as interpreters for ascertaining the views of children with profound and multiple learning difficulties. This method of researching the views of this group takes into account the significant communication issues and the prerequisite of building a relationship and shared means of interacting in order to enable the individual to communicate views. Interestingly, 'relationships and happiness' emerge as key themes, extracted from grounded theory analysis of the reports from communication partners. Ware (2003) acknowledges that teaching people with profound and complex learning difficulties about communicating preference 'will significantly improve their enjoyment of their lives' (Ware, 2003: 10).

She clarifies differences between anticipation, choice-making, ‘contingency-awareness’ or the awareness that other options are available and decision-making about life choices and, in common with other writers (Dyson, 1998:9), warns against relying solely on inferred generalisations from learner responses.

This view is further substantiated by research by Porter (2003:15), who advocates a ‘verification process’ to provide ‘additional supporting evidence ... both to validate the authenticity of the views but also to provide a richness and clarity to the data’. The importance of triangulation is highlighted in particular in relation to the interpretation of learner voices in this context, not only due to the difficulties in relation to communication but also due to the linguistic difficulties mentioned earlier in this chapter: ‘Differing beliefs, attitudes and perceptions are embodied in the language and definitions of SEN and inclusion’ (Kershner & Chaplain, 2001:32). It is interesting to note that the ‘key messages’ of Porter’s research include reference to ‘meaningfulness’ and ‘context’, which is pertinent to the key themes expressed in this study as ‘motivation’ and ‘relevancy’. Kershner and Chaplain (2001:12) report that ‘pupil voice research’ findings raise issues of respect, relevancy, autonomy and decision-making, again an echo of the key themes of this study.

It is clear from the literature and research of others that capturing the ‘correct’ set of inferences from the voice of the learner is highly complex. One learner may not represent others; inferences drawn from one encounter may only be relevant at the time and may be inconsistent with the same learner’s views in the future; inferences may not be accurate. In this study, I have accessed the voices of learners using a

range of methods; in the constructing of the taxonomy of key themes, I used recorded data of learner evaluation, practitioner focus group discussions and insights from the literature. I also used information from the survey, follow up interviews, observation and 'training' with practitioners to check and expand the key themes, and I used case studies to test out the impact of exploring teachers' understanding of the culture and ethos of an organisation in practice in order to effect changes in teaching strategies and observed outcomes (detailed in the chapter which follows).

In this sense, the approaches used to interweave the voices of learners in this study mirror the focus of some of the findings of the study documented by Porter et al (2000) in that I have attempted to underpin all aspects of the study to be consistent with direct or reported data regarding learner views, in particular in relation to the impact of organisational culture and its manifestation in teaching strategies on achievement of learner satisfaction. O'Hanlon (1996:87) describes action research in education as a learning process which must have 'a central ethic or principle acknowledged within it'. Given that the focus of this study is the impact of organisational culture on the quality of teaching and learning, I developed this 'multilevel approach' (Kershner & Chaplain, 2001:72) in order to ensure that in examining organisational issues, the learner remained central to each consideration. In some ways, I borrowed from the strategies of the ethnographer to further this investigation of learner experiences. Observations were part of the action research in providing prompts for reflective discussion, but initially observation was used to investigate the manifestation of the key themes in practice, to observe their impact in terms of quality and to identify organisational issues impacting on them, since it

enables description and analysis of 'practices and beliefs of cultures and communities' (Mertens, 1998:165). Because the focus was key themes, or quality indicators, the research became enmeshed in quality developments within the organisations. Therefore, in part the study can make a claim to ethnography since,

'Ethnography is of course more than a single method and can be distinguished from participant observation on several grounds, one of which is that of its broader aim, the analytic description of a culture' (Van Maanen, 1979:539).

I submerged myself into the three organisations, and I include my own organisation in this, because my emersion was different from my normal 'hat'. When engaged in research activities, I followed more than led, listened rather than spoke and learned much more. It changed my own approach to management, because I was able to perceive my role and actions and evaluate my own holistic maturity differently. It was a significant challenge to attempt to recognise the differences and similarities of my own interpretations of actions, events and actors within the process and I was greatly assisted in this challenge by some key participants, who initiated communications with me and who acted as inspiration and as sounding boards. Agar comments that the first people to approach in this way are usually those whom he calls 'deviants' and 'professional stranger-handlers' (Agar, 1980:85). I experienced many conversations with the latter in all three organisations: people who seemed to always be present to assist me and to be understanding and helpful, people who avoided depth of conversation by keeping to broader topics which were felt likely to meet approval. In one organisation, the key stranger-handler actually changed an entire

organisational system (I discovered later) relating to timetabling, in order to present it to me at our meeting, prior to which she, not I, had suggested the topic. Even within my own organisation, the 'deviants' were ready and willing to engage at length, and one manager from another organisation seemed so delighted to engage that he did so whilst very carefully and laboriously making us tea and toast in his office and proceeded to explain his perspectives which were startlingly dissimilar to those of his colleagues. The potential for gaining an incomplete picture of the organisation is very apparent when taking the notes from these interactions alone, Agar advises that it is important to select participants from different sections of the 'community' (1980:89), although I found that in the initial stages, defining this can be complex in some organisations, since the differing perspectives are not always role specific.

Observations provided a way of viewing participants' actions in relation to the key themes and also their assertions about learners. Observing sessions and informally observing 'in-corridor' interactions, I was able to observe learner involvement and responses with participants who were discussing their practice with me reflectively.

Research indicates that teachers perceptions of their changes in their performance are often reported as significant when small changes have taken place. 'What registers as a small change in an observers' eyes may be a large change from the teachers' perspective' (Van Zoest & Ziebarth, 2002: 266). The literature relating to emotional intelligence prompted me to become interested in the convergence of participants' reflections with the actions observed. Participants who expressed high levels of self awareness in reflecting on practice also demonstrated better relationships with learners. I do not mean that their linguistic skills were greater

necessarily, but their tone and gesture carried their point. However, in one organisation, the level of training in expressing views in keeping with the organisational culture occasionally masked a lack of awareness in translating these principles into practice. One practitioner, for example, gave signals of aggression in her face, tone and proximity; she could explain quite clearly the theory of communication strategies, but when accounting for the responses of learners to her communications, she retreated to a stance of explaining the learner's difficulties, without analysis of her own interaction style. Her interactions in interviews appeared defensive-aggressive, although she was very keen to be interviewed and she said, 'I would like to have more opportunity to teach younger staff how to work with the students.' It was only through observation that I was able to ascertain the views of learners, through their reactions, to her communication style. Observation 'provides an opportunity to record what people actually do in real life, rather than what people say they do' (Kemp, 2001:528).

There were some occasions within the research process in which my dual roles of manager and researcher presented a direct challenge to my approach to the research. This did not occur solely within my own organisation, but also in the others. I was confronted with situations which presented me with ethical dilemmas, because I considered that an intervention should be made on behalf of the learners, but I was conscious of my partisanship. Some decisions were clear, such as the health and safety issues mentioned below. However, situations in which the participant's manner was affecting the learners raised the question of my perceptions as well as the participant's awareness. These dilemmas assisted my own development as a

manager in that I explored alternatives to stimulating increased awareness from participants (and myself). Denscombe (1995:141) comments on a study by Bennett (1991), stating that actually

‘challenging the rhetoric of the “representatives” in the research (had) allowed the researcher to probe beneath any superficial rhetoric ... by actively questioning respondents in a mild form of adversarial exchange.’

Both formal and informal, or ‘naturalistic’, observations were used throughout the study. I was aware of the ‘power implications’ (Burton & Barlett, 2005:130) of my role within my own and the other organisations. I used prior interviews and I developed an observation role demeanour to minimise this as far as possible. I used ‘participant-as-observer’ forms of observation, in relation to the verification of participants’ analysis of their own practice and operation of ‘emotional intelligences’. In addition to the role issues, consideration was given to accounting for ‘observer bias’. Moyles (2007:244) identifies four elements of observer bias: selective attention, selective encoding, selective memory and interpersonal factors. These factors arise from an acknowledgement that the researcher approaches the study from his/her ontology, and that this will not only impact on the focus of attention of the researcher during the observation, but also on the planning of observation focus and the recalling of the observed actions. During the study, identified members of each organisation also observed in order to provide some comparison data to challenge my interpretations, as well as to test the use of approaches to observation which focus on the key themes. The focus of the observations was defined through discussions within each

organisation relating to their views on critical elements of practice, which enabled me to generate recording which was geared to observations relevant to their criteria. These criteria informed the development of the key themes described in Chapter 1. However, it was not always possible to remain a congenially non-challenging, distanced or participant observer. As Kemp points out (2001:531), 'Combining the role of researcher with that of professional worker with a duty to service users and learners contains the potential for role conflict.' There were occasions when I felt it necessary to intervene due to health and safety issues, such as the occasion when a member of staff and a learner were engaged in an activity directly behind a learner in a wheelchair without the brakes on; or due to a learner asking for help, such as the occasion when a learner's pained expression and eyes pointed to me, unnoticed by staff, showed his need for help. This role issue was discussed when necessary within the context of the ultimate purpose of observation, to enable the staff member him/herself to develop increased insight into individual learning, rather than to form externally derived judgements. In this way, the observations could be seen as part of formative assessment, enabling 'a better understanding of learning rather than an act of compliance' (Broadhead, 2006:201).

Analysis of the data arising from observations linked to the analysis detailed in previous sections of this chapter. Recording against negotiated criteria, cross referenced to the key themes, was undertaken throughout. During the latter part of the study, as the epistemology relating to individual staff development and holistic maturity emerged, the observations and analysis were considered in conjunction with interviews in relation to the emotional intelligences of staff eg levels of self-

awareness and relationship management and reliability of self-perceptions in reflective practice. Research by Kuit et al (2001:129) notes this distinction between observation feedback compared to feedback to 'inform the reflection that should inform the teaching'. Kuit et al describe a range of methods of reflection, three of which are incorporated in this study: action research, critical incident, storytelling. They are presented by Kuit et al as if they are alternatives, whereas in this study they are integrated, since I consider the process of reflection, including analysis and theory-building, and the process of planning, acting, evaluating, adjusting, as part of the action research process. Elements of the study were implemented through use of focus groups. These groups supported the process mentioned above, challenging or reinforcing perceptions and theory construction, providing a forum for practitioner reflection. 'Reflection is difficult when done in isolation' (Kuit et al, 2001:139)

Focus Groups

The focus group is a qualitative research technique which was originally developed by social scientists (Glitz et al, 2001:32). It involves discussion of a topic by small groups of participants, whose exchanges form the data. This approach has been used extensively for market research purposes, although the market researcher tends to use the technique for hypothesis testing (Secker, 1995:78) rather than for constructing understanding of social phenomena.

I refer to 'training' and 'staff development' within the study, but these need clarification in relation to the focus group methodology. There were points in the study at which participants identified through discussion areas for development conducive to achieving their quality aspirations, which informed the development of

the 'key themes' described in Chapter 1. Through these discussions, actions or interventions were identified, implemented and evaluated. Within the context of this study, one might consider this as elements within the action research cycle, but within the organisations, it was mostly considered in terms of 'training' or 'meetings', although the research purpose was clearly stated each time. There were also points at which the 'management discussions' intersected with the epistemology, such as the group discussion which centred simultaneously on a key management issue and a research study question: if individual staff are not consistent in flexibly implementing the key themes to suit the individual learner, what can be done? My response was to provide some insights from the literature and to share my thoughts in support of the slow paradigm shift towards a focus on development of individual staff 'intelligence', which informed the development of management actions, such as use of coaching. The linguistics are important because they signpost ways in which the research and practice were iterative. However, there is a difference between the ordinary processes of organisations and the action research process. The focus group elements of the study were often conceived by participants as an ordinary process of meeting or 'training', which happened to be additionally part of a research study. In many respects this was helpful; since the data was extracted in a naturalistic way, the discussions of theory and reflections of practice became embedded in the practice evaluation of one (my own) organisation and still continue, often through other members of the organisation conducting research as part of their study for qualifications. Galinsky et al (1993:440) emphasise the need to recognise and 'take advantage of the knowledge the practitioner brings to practitioner research', and condemn the way in which the 'practice-research relationship is conveyed as

unidirectional - from researcher to practitioner ... implying that the perspective of the researcher is more important ...'

The process of selection of participants for focus groups was dependent on the issues to be explored, which developed throughout the period of the study and were in turn generated by some of the discussions. In relation to the development of key themes, data was gathered through survey, individual interviews and through focus groups consisting of those responsible for curriculum development and managers, although one of the early focus groups was a very mixed cohort of participants from a range of organisations and roles who discussed in brainstorming fashion the question of quality of provision for people with profound and complex learning difficulties and/or disabilities. Another group, comprised of learning support assistants, also tackled the quality components question. In this way, at each stage of the research, identified in Figure 2.3, I targeted groups and individuals within the organisation who had experience and knowledge relevant to the discussion topic, but in addition, I scheduled groups from outside the organisation and/or from other roles within the organisation, in order to provide the potential for a broader perspective and to challenge assumptions derived from role emersion.

As one of multiple methods used, I found focus groups useful for providing participants with opportunities to discuss issues with the support of peers. Focus groups are organised to explore specific issues through 'the interaction *between research participants*' (Kitzinger, 1994:103). In two of the three organisations in particular, the focus groups featured banter, disagreements and laughter which gave

the discussions momentum and enabled colleagues to draw out others, often with little intervention on my part. The groups also enabled me to tune in to the language and tensions for periods of time without engaging actively. 'Listening to discussions between participants gives the researcher time to acclimatise' (Kitzinger, 1994:108). One of the key benefits of the approach was in helping to identify group norms and values, such as the 'drowning in paperwork' issues raised by one group which expressed doubts about the benefits of the paperwork in supporting teaching and learning. This was explored further by the group and revealed a lack of clarity in their understanding of the purpose of the work and methods open to them, especially as curriculum co-ordinators, revealing a gap in training and support. There was an additional layer of tension in the perceptions of the rationale for allocation of co-ordinating roles. The discussions gave insight into the group processes and a significant lack of confidence and tensions within the organisation, which had experienced a recent change of head teacher. The previous Head had been highly autocratic and a legacy of nervousness was very apparent. The focus groups gave opportunities to 'clarify ... their underlying assumptions and theoretical frameworks' (Kitzinger, 1994:116) and demonstrated ways in which the group members reflected and influenced each others' reflections. In one sense the groups were a microcosm of aspects of the organisation, demonstrating the ways in which communications and interactions are used within the organisation, the ways in which the organisational culture is reflected, reinforced and affected through stories and actions and the roles and motivations of some of the individuals within the organisation.

Focus groups were used at points throughout the study for different reasons. The earlier groups were convened to ascertain the perceptions of participants in relation to notions of quality of practice, used to formulate and test perceptions of the 'key themes', and to provide an opportunity for me to observe the ways in which opinions were voiced within the organisations, the language used, how challenges were viewed, how the organisational culture was reinforced and developed. The groups were used both as a means of constructing theory and as a means of testing perceptions of theory and its applications in practice. One of the most useful contributions to the study was made by a discussion of the challenge to the organisation of ensuring that every staff member had the skills to implement the key themes flexibly to support the individual learning needs and interests of each learner. This discussion was the trigger for recognition that training in teaching approaches and techniques is insufficient, even within an organisation which explicitly and implicitly reinforces the key themes as fundamental. This view carries an assumption that, 'if sufficient information is made available to people, if they think it applies to their own situation, and they are reminded of its content on numerous occasions, then they will alter their behaviour accordingly' (Wilson, 1997:213). The study was indicating that this repetition alone was insufficient. For example, repeated discussion regarding principles and training regarding strategies were not sufficient if the member of staff was not in a state of readiness to be able to assume the attitudes and strategies, make them part of his/her own being and translate them in numerous forms in implementation with different learners. The group discussed which individuals were perceived to be compliant in varying degrees and those who were not. This discussion alongside the observations and 1:1 interviews formed part of the

impetus for consideration of the development of individual staff in relation to emotional intelligence.

Focus groups provided a complementary method for gathering data, because they offered opportunities to study interactions between members and a means of gauging perceptions. However, 'group interviews are of little use in bringing intensely personal issues to the surface' (Watts & Ebbutt, 1987:33), so 1:1 interviews were used additionally to explore the issues. Wilson (1997:212) outlines some concerns regarding the extent to which the researcher can 'separate the disparate layers of respondents' explanations and meanings from researchers' interpretations', and that the roles played by the researcher 'may be related more to their own perceived skills and knowledge' rather than epistemological or methodological reasons. There is some basis to this within the study. As discussed earlier in this chapter, my practitioner and management roles meant that I had preconceived views and experiences which had an effect on my approaches to the study. It is unlikely, perhaps impossible, that this factor was removed from the study, but my epistemological stance changed significantly throughout, demonstrating that I was not using the study merely to ratify my assumptions. 'We see the presence of the researcher's self as central in all research. One's self can't be left behind ...' (Stanley & Wise, 1983:162). The focus groups allowed me to listen and observe interactions, but perhaps more significantly, due to the lesser demands on my own involvement in the discussions, the focus groups enabled me to gauge my own thoughts and reactions simultaneously and to be more consciously aware of my subjectivity. I was not attempting to eliminate my effect on the research, but I was acknowledging 'the

crucial role of the interviewer and the way in which he/she is inextricably bound up with the production of the research data' (Denscombe, 1995:138). I described this approach as 'complementary' at the beginning of this paragraph, because I construed that it would facilitate a more complete understanding through providing a different perspective, displayed through interactions between participants, and through testing the issues raised through other methods. It also provided an opportunity to witness the ways in which participants sometimes altered their views as part of the process, both within the focus group situation and in other situations as a result of the focus group interactions. Wilson (1997:218) views this phenomenon as 'contaminating' multiple methods but this seems an overly critical word, since the change of account was not necessarily due to peer pressure or compliance. Sometimes it was attributable to a process of development through reflective discussion. In terms of methodology, this phenomenon was useful in exemplifying both the transference and reinforcement of organisational culture as part of the processes of self development, considered in relation to the development of emotional intelligence in this study.

Summary

This chapter has explained the range of methodology used within the study, the journey of constructing and revising epistemology and some of the tensions and challenges. Gioia and Chittipeddi (1991:435) note that 'because the development ... of organisational interpretive schemes is typically a subtle and evolving process, traditional survey methods and even in-depth interviews cannot adequately reveal the nature and sequence of changes taking place'. A question raised by Martin

(2002:16,36) in relation to explorations of organisational culture, was whether culture could be understood best from an emic (insider) or etic perspective. Using my own organisation as one of the study areas provided an interesting challenge in itself, but also emphasised to me the notion of the interrelationship between the emic and etic when approaching the two other organisations with an attempt at openness and yet, quite clearly, a set of predispositions in relation to what I sought and my own 'filter' of analysis. Geertz (1973:9) summarises this very clearly: 'What we call our data are really our own constructions of other people's constructions of what they and their compatriots are up to.'

Study of my own organisation gave me depth of insight through emersion and familiarity; whether familiarity necessarily gives insight could be argued, of course. Sociocultural anthropology researchers advocate this type of participant-observer emersion. Some argue that depth of insights and 'deep assumptions' elicited from long term ethnography cannot be uncovered through 'superficial' attitudes which are relatively easily articulated ('artefacts': stories, rituals, dress, décor, values) but must be understood at a deeper level through taken for granted 'basic assumptions' which are often difficult to determine (Schein, 1992:21). Others challenge the notion that artefacts and values are necessarily superficial (Martin, 2002:47). Like Martin, I considered the uncovering of 'artefacts' in the critical incidents discussions with participants from other organisations some help in understanding the organisational culture. However, because it is so complex, it seemed that my depth of understanding would be compromised without getting closer to the action through involvement. I also constantly aimed to keep a check between perspectives from my

own organisation against the other organisations featured in all parts of the study in order to ascertain points of commonality and dissonance. However, it must be recognised that I was essentially approaching the study from an ontology generated from my own organisational paradigm, in which the 'key themes' explored in the study are identified as 'valued added' features of our work. In one sense, I was attempting in part to tackle the concern that the researcher as 'cultural stranger' (Morgan, 1993) cannot access meanings 'only available from the cultural details that arrive with organisational memberships' (Elsmore, 2001:11). Furthermore, I attempt to deduce from the study some 'generalisable theories' in respect of an holistic paradigm. Whilst some organisational culture researchers consider this abstraction from observation acceptable (Hofstede, 1980; Tulin, 1997), others eschew abstraction in favour of defining culture as context-specific knowledge (Smircich, 1983; Geertz, 1973).

Methodological pluralism (Trow, 1969:33), through combining the use of observation, involvement in staff development and discussions using the critical incidents technique, was used as a means of gaining a more holistic set of perceptions about a complex and dynamic set of phenomena, in an attempt to understand how people make sense of their world in this context. The introduction of 'emotional intelligence' within the study emerged through resonance between the literature and action research and through the increase in my depth of analysis of practice, arising from the process of the research. It was part of the ongoing 'construction', not pre-planned but achieved through pluralistic methodology. Whilst the critical incidents interviews aided my identification of key themes and common ground, differences and

organisational barriers, the active involvement in the three organisations enabled me to delve further into the similarities and differences in the ways in which the key themes manifest and break down in different organisations. The strategies used by myself and others to address areas of difficulty within the key themes, also provided a method for testing approaches to training, coaching, supervision, support and management within a range of contexts.

This eclectic approach at first resulted in a confusing array of strands to individual and organisational quality improvement. Faced with this complexity, I was prompted by the integration of research, reading and reflection to re-construct my conceptualisation of organisations. The web-ball concept, inspired by theories of unity (described in chapter 1 and chapter 3), enabled me to perceive the development of both learners and staff in a coherent, but non-formulaic structure. This fundamental shift in my thinking is tracked through the discussion of data in the chapter which follows.

Chapter 3: Results and Discussion

The discussion in this chapter follows the process of planning, action and reflection illustrated in Figure 2.3 in the previous chapter (Methodology). Presenting the research journey in this way aims to allow the reader to grasp the steps in the process layer by layer, although it should be noted that the chronology of the study was not ordered in this linear way. Looking back at the notes, even early interview discussions sometimes touched on issues relevant to the latter stage. Therefore, the sequence presented here is more representative of the process of generating epistemology, rather than the order in which the data was acquired.

The study started as an investigation of the curriculum and teaching approaches for learners with profound and complex learning difficulties. My aim was to identify critical components which would drive up the quality of provision. However, the data collected in the early stages of the study showed that learners, practitioners and other research considered some of the critical components to be about how the learner *felt* and *experienced* the learning process. This was reflected in the identification of elements of good practice, which I termed the 'key themes'. The key themes, which are discussed in Chapter 1 (Literature Review), were developed into an initial framework which I hypothesised could form quality indicators. The key themes are: (1) relationships and communication; (2) tailor made learning (including relevant learning and progress, structure and flexibility); (3) learner control (learner-led activity, motivation and choice). I have entitled this part of the study as Stage One.

During Stage Two, the actions and reflections served to ratify and substantiate the key themes, but a further layer began to emerge. Examination of the barriers and difficulties in achieving the key themes in action revealed that although pockets of good practice could exist, a conducive organisational culture and management practices were critical to achieving quality throughout the organisation. This also applied to collaboration between organisations, which added further dimensions to the challenge. In some respects, this stage of the research seemed to move from a more learner focussed investigation to a broader one. However, I will outline some examples in the Stage Two section below which illustrate how the emerging findings repeatedly took me back to the impact on the learner. It was often clear that even within the context of an apparently mostly conducive organisational culture, the particular actions and attitudes of individual managers and individual practitioners could override the ethos. This was not a uniform phenomenon. Some individuals were even able to talk the language of the key themes and largely act in accordance with them, except in certain circumstances.

At Stage Three, the research activity is aimed at investigating this uneven profile further. So far, the research identified that some organisations may not have an organisational culture and management practices which support the implementation of the key themes. These difficulties were found to be magnified when organisations attempted to collaborate. However, some organisations seemed to be largely aligned to the key themes, but implementation was patchy. What would make the profile more homogenous in quality terms? If tailored learning is a prerequisite, then clearly we would not be aiming for everyone to act in the same way, but what would be the

optimum set of conditions, expertise, attitudes and behaviours? Two interconnected dimensions were explored at this stage: the holistic development of individual managers and practitioners to enable each person engaged with each learner to continuously acquire 'intelligences', including knowledge, expertise, experience and 'emotional intelligence' - in other words, to develop staff to be 'mature' (not in age) individuals, capable of responding to the learner in whatever way is required. The second dimension is connected to the first and relates to the role of the learners in embedding quality. The examples in the Stage Three section below illustrate the ways in which staff were able to learn from the learners with profound and complex learning difficulties/disabilities; at the point of increasing emotional intelligence, staff seemed to become open to learning from the learners themselves and so the process of learning evolved into greater reciprocity. This fundamental role of the learner required a different conceptualisation of the organisation, which emerged from the action research and reflections from the literature.

Although three organisations formed the main focus of the research, other organisations participated on a smaller scale, through response to survey and follow-up interviews, critical incidents and in some cases focus group workshops. I should clarify that the examples provided from different organisations are not designed to form a grading of which is 'best'. As outlined in the Introduction, the study quickly moved away from a 'magic' formula for achieving the key themes. Indeed, the key themes themselves are subject to differing interpretations by participants. Instead, the focus here is on the unique but synergistically related process of development of learners, staff and organisations. Instead of an attempt to typify the features and

prerequisites of an organisation which provides outstanding quality, the study led away from normative comparisons towards a more fluid and dynamic paradigm of holistic development.

In this chapter, the milestones from reflections on the action research are highlighted in bold to enable the reader to track the process.

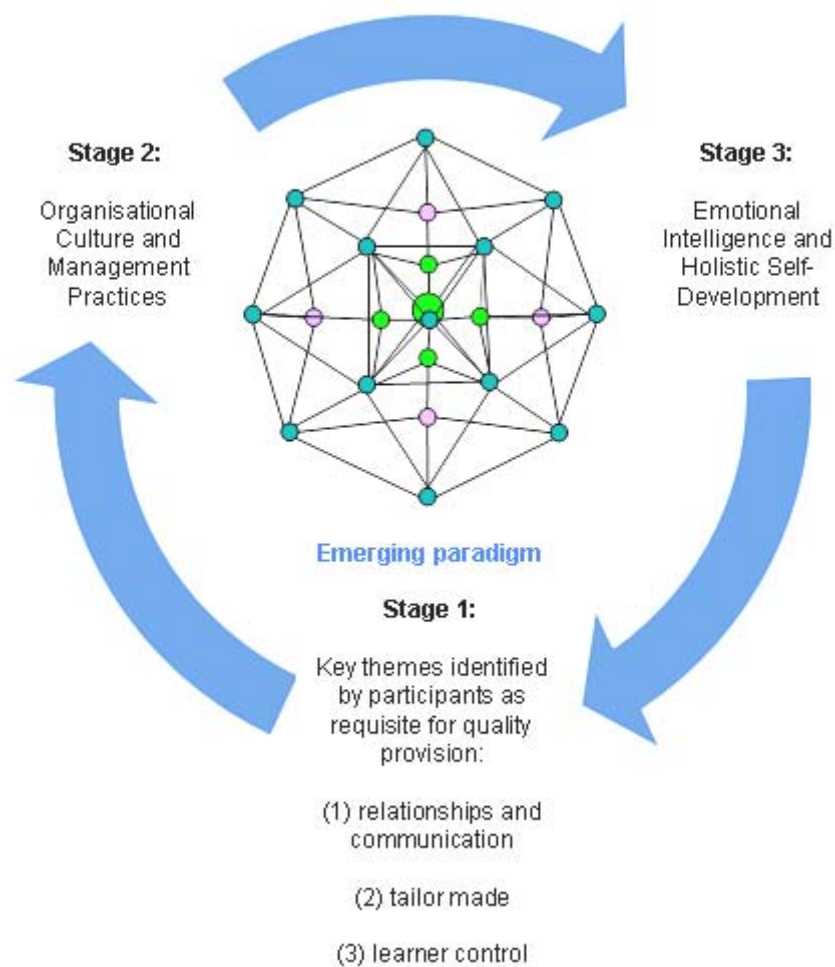


Figure 3.1: Summary of the three stages of the study

The arrows in the diagram are circular to represent the non-linear, continuous interaction between the stages. The 'emerging paradigm' in the centre is the organisational web-ball which is explained at the end of this chapter.

Stage One: The Key Themes

The survey and follow up interviews conducted in the earlier stages of the research generated patterns of commonality in the data. As it emerged, I identified clusters of similar elements, which I termed the key themes. Under each key theme heading below, I provide some examples of interview extracts, which reflect the baseline information from which the planning of actions emerged. After collecting the baseline information from the survey and follow-up interviews, I worked with members of each organisation to identify their views on the key themes, their issues as individuals and/or organisations and agreed actions and evaluations.

In this Stage One section, I have not attempted to recount the various phases of discussion and planning, action and evaluation. Instead, I have selected examples of the data and actions which signposted the research towards Stage Two and Stage Three.

Relationship and communication

The key theme of relationship and communication featured most frequently in the study. When asked in general terms about quality of provision, or when asked to identify strengths and weaknesses of the organisation, most participants included

comments relating to this theme. The categorisation and analysis of participant input is expanded below in the section on culture and management.

Communication was mentioned in varying ways by participants in the follow up interviews. However, probing resulted in a realisation that it was not simply the inclusion of communication in the curriculum which was perceived as important, but the need for staff to be supported in the development of the **skills and attitudes** necessary to be effective facilitators of communication, with individuals whose communication styles were atypical. This is consonant with recommendations in the literature reflecting interactive philosophy, as discussed in Chapter 1 (Literature Review). Most participants felt that training in communication strategies such as signing, intensive interaction, use of pictures and symbols, was important. Some of the managers stated that training did not always seem to filter into every-day practice, especially in relation to the use of signing, which was interesting to note, since 'some' or 'more' training in signing was identified by participants as needed in all three of the main organisations in the study. Furthermore, training evaluations collected during the study frequently identified signing under the question relating to further training needs. Five participants, across two of the organisations, also noted that signing was considered important by Ofsted. It is helpful to clarify here that the learners in the three organisations had a range of learning difficulties and disabilities. Signing was not something which I wished to focus on in particular, but it was very frequently raised by participants. This was one of the 'clues', which pointed to the need to consider organisational and individual issues, because on the surface the

information provided by participants was often contradictory, as exemplified in the focus group discussion below:

H - We all have to use it (Makaton).

S - Yes that's right. All the time.

H - But I never had the training. I try to copy, you know....

J - Didn't you cover Makaton in the induction?

H - Yes. But, that was just one session.

S - I haven't either.

C (facilitator) - So, we need to think about the training programme in terms of how much input and when. Also, we probably need to think about other forms of communication? Can you just run through each of the pupils in this group? Let's look at how each person communicates right now and any thoughts about other possibilities.

The exercise was carried out by participants. The group of learners discussed in this extract were learners with profound and complex learning difficulties/disabilities (PCLD).

C (facilitator) - You put here 'turning head'. Can you expand a bit on that for me?

H - She's blind. Well, we think she can see lights. She doesn't see clearly, you know.

C (facilitator) - Ok. So you've put touch, sound, yawning noise....

Discussion of sensory communication continued. Then,

C (facilitator) - You were mentioning Makaton earlier. But you've identified these areas as more appropriate for D. Is that right?

Several participants -Yes.

As the discussion progressed in this way, it became apparent that Makaton (a basic signing system) was not the primary training need for staff in this particular group, because none of the learners were able to sign, although two learners were able to observe staff signing, but had not shown responses to this at the time. Three of the learners had insufficient functional vision to see signs and insufficient hand mobility to form them. The issue which interested me was why the participants felt so strongly about Makaton training, but had not emphasised training in sensory approaches or intensive interaction, which they identified as a higher priority for the needs of the group of learners. I raised this question with managers in the same organisation. The response was: 'We offer a signing environment; all staff should be signing ... Some are better than others.' It was considered appropriate for all staff to use signing, as many other groups were able to benefit, as well as some of the learners in the group under discussion. However, the signing 'rule' seemed to have dominated shared understandings and left some confusion about the role of other forms of communication and tailoring of communication systems to individuals. The staff needed considerable prompting to discuss other approaches and often lacked the label to describe what they were doing. They felt that they were not always clear about other approaches. This prompted me to look again at the data gathered to see if there were other examples of tensions between organisational 'rules' about teaching and learning, individual staff perceptions of the 'rules' and individualised

learning programmes. I refer to 'rules' rather than shared understandings here, because it seemed to me that **staff were echoing organisational convention *without* a shared understanding.**

There were indeed other examples within the data. One manager had clear expectations that everyone within the organisation should be using a technique of 'running commentary'. Her perception was that this should be tailored to the individual, but served as an expectation that staff would always explain their actions to learners and ensure that learners were fully informed so as to support increased learner engagement. During a focus group training session, a heated debate developed, in which it was evident that some staff perceived that the approach was intrusive, particularly when out in the community. The interesting twist to this discussion was that the discussion itself was a reflection of the ethos which the manager was attempting to embed in relation to tailoring to learner needs and respect for learners. In this example, the organisational convention, which had been reinforced through many training sessions and discussions, was being subjected to a process of refinement. However, during a subsequent research interview the same manager commented as follows:

I think they had slightly the wrong end of the stick. If the student was embarrassed by the running commentary, they weren't making it suit the student. There are so many ways to do it. The point is, if we say, 'Sometimes do this, sometimes do that', then the Ds (reference to staff member) of this world will be fine, because they own it. They own the whole thing about doing it in the right way for the student. The problem

is the Cs, Js and Bs of the world. You need to give them strong guidance. If they say, you know, 'Do what you think'... well it doesn't bear thinking about really!

This extract touches on both of the areas which were developed further in the study: the role of organisational culture and management, in this example relating to shared understandings, and the issue of developing individual staff in order to enable them to implement dynamically the types of communication support required by the learner and the learning situation (refer to Stage Two and Stage Three below).

A range of actions took place which could be placed under the communication heading. The actions related in this section provide a context for the subsequent sections relating to organisational culture and emotional intelligence. Therefore, I have described the actions and evaluations to provide information for organisational culture and staff development analysis, rather than engaged in weighing the merits of the various strategies available.

Arising from the interview feedback, one of the actions identified by management teams in two of the organisations was to carry out some training and discussions relating to definitions of communication and the range of strategies available. One organisation (A) also developed a system for reviewing communication with each teaching team to enable a greater focus on how to engage individual learners within the class and incorporated the Speech and Language Therapist (SALT), the Makaton trainer and the IT technician as required. The SALT considered that the generic approach of training staff to sign was insufficient. She worked with the Makaton

trainer to facilitate training for teaching teams in signing required by each learner at the time. The subsequent Observations of Learning and Teaching (OLT) showed an increase in the use of signing, but still reflected differences between the use of signing across teaching teams, attributed in evaluation to the **level of confidence** in signing of the teacher leading the class. This issue is revisited later in this chapter in consideration of the role of coaching in spreading expertise.

The other organisation (B) focussed on a more generic approach to communication. The teacher group tasked with addressing the issue felt that the interview feedback provided reflected a lack of input regarding the range of strategies available. A series of training sessions were carried out, mostly led by members of the team internally. I also facilitated a workshop designed in assisting the team to identify a learner's communication skills and aspirations. A trainee teacher supported some of the other staff in developing individual visual timetables, following OLT discussions. The evaluation of this activity comprised OLTs and team discussions and identified the need for an ongoing programme of training. Although these activities appeared to add value and, following further OLTs, were considered to have impacted on interactions with learners to some degree, the observations showed that the **practice was still patchy**. I was also interested to note the different approaches of the two organisations, which I will revisit in the section on organisational culture below.

The third organisation (C) had a very strong emphasis on Makaton. It held specific Makaton classes for learners, although the use of signing outside of these classes was identified as inconsistent by the team. My observations were less positive,

identifying almost none being used outside of the specific sessions, except by two members of staff, one of whom was in charge of the Makaton sessions. It should be noted that whilst some of the learners in this organisation had profound and complex learning difficulties/disabilities (PCLD), there were also many with Severe Learning Difficulties/Disabilities (SLD). I had initially intended to focus on the PCLD group of learners, but I found it necessary to broaden the scope of work in order to understand the impact of some of the broader organisational issues on this group. Generally, it was harder to extricate any clear shared understandings of communication in this organisation. There was very little formal paperwork evidence and a fairly ad hoc approach. There were a few members of staff who were recognised as being 'good' (manager's comment), but there was a lack of structure for capturing, guiding or spreading good practice:

J - We have to communicate in lots of ways to reach them. You've met C? She gets to the point when she's so really excited and desperate to communicate, she stops herself (body tension gesture).

C - Yes. She gets so excited that she can't get the sound out.

J - Yes, that's right ... B's marvellous; she knows how to get her calm and more like focussed. You know? She's great with all of them actually. She's got that manner. You know? She gets the feel of things sort of.

Later in the interview, J was discussing training activities:

C (facilitator) - When you were talking about B earlier, you were saying she was really good at tuning into them.

J - Yes, but that's her. You can't teach the others that really. You know. We do the Makaton and N (community team SALT) does some stuff, input, but ... (tailed off).

Within this organisation (C), there were identified people who assumed the role of 'expert', but this seemed to be perceived as a 'given', rather than as skills which could be further developed and spread to others. However, there were some moments in interviews with two of the managers in which they each referred to 'working on' staff attitudes which seemed to indicate that they might be able to influence change in the behaviour of staff. One of the most interesting subsets of comments within the communication key theme was in relation to attitudes to learners who express themselves through challenging behaviours. I should clarify that I categorised challenging behaviour within the communication key theme, although some of the participants did not express the view that challenging behaviours are a form of communication. As detailed in Chapter 2 (Methodology), in analysing the data relating to challenging behaviours, I was mindful that my practitioner experience and views are particularly strong in this area. I consider it my role to assist the learner in gaining more appropriate communication strategies through identifying his/her preferred learning style and ensuring that I acquire the skills to support the learner. I do not consider challenging behaviour to be 'naughty', nor do I believe that learners should be punished. However, I have encountered many circumstances in which staff in other organisations have acted in a way which does not sit comfortably with my ontology. In my own organisation (A), these views were consistently echoed by the lecturers in interviews and in OLT practice, including those interviews which were reported rather than held directly by me. Views were

fairly consistent amongst teaching aides and other staff, with some exceptions. Staff applying for a post in the organisation are required to answer questions at recruitment interview relating to communication with learners, colleagues and parents, and there is a specific question relating to challenging behaviour. Discussion of the interview data led to a series of actions within the organisation, including introducing a 'support plan' which documented the impact of strategies against a baseline and changed arrangements for the training of staff, including training as trainers of key members of staff to enable roll out training in a manner which is in keeping with the organisation's shared understanding (called 'shared concept of good practice'). Further consideration of the relationship between practice and culture is considered in the next section. However, it may be useful to have noted these comments prior to examining the data below, since I directly influence some of the action from my own cultural standpoint.

In one organisation (D) I was engaged in an interview with the Head of the organisation discussing challenging behaviour. Although the learners were adults, the Head was expressing views about challenges in a way which I had heard often from school based practitioners. His previous work had been with children. By coincidence, a learner and a member of staff interrupted the interview in order to report to the Head that the learner had hit a member of staff. Standing in the doorway, the Head used the tone of voice which one might associate stereotypically with reprimanding a naughty child. He then instructed the adult learner as follows: 'You will sit there for half an hour and think about what you've done.' There was some repetition of this. I was not able to see whether there was any physical

intervention, but eventually the Head returned to the interview looking red faced and tense. It may be that he read the expression on my face, but he asked what I would do in that situation. At this point, I did state that I would be answering from my own organisation's perspective and that I was aware that I did not know the learner. It should be noted that the learner had the ability to communicate verbally at about Entry Level 1 equivalent. I asked the Head if he had asked the learner why he had hit the member of staff. He had not. I explained that in my opinion there is always a reason, and that the learner may not be able to express it, but that it seemed appropriate to ask since it may be something which the staff had done which acted as a trigger. The Head was very receptive and did not seem defensive so we continued with further questions. Does the learner have a concept of half an hour? Is the learner able to sit and reflect without support? What is the purpose of sitting outside his office? Is it a punishment? What is your view of punishment? We discussed sharing responsibility for inappropriate communicative behaviours. I commented that the staff may copy the Head's approach and that it was important for the Head to be aware of his tone of voice.

At this point, the Head immediately wanted to try the new approach and he was anxious to talk to the learner. After an appropriate discussion between the Head and the learner, we went to collect lunch, the Head invited the learner to apologise to the member of staff, but the member of staff said to the learner, 'I don't want to talk to you.' I stepped back and the Head talked calmly to the staff and learner and managed to facilitate a more positive exchange. A further conversation then took place with a manager who also asked me what I would do. The Head joined us for a

discussion. The manager was polite, but sceptical. However, I felt that this had been a remarkable opportunity to address issues which I had been concerned about for some time, but I had been circumspect about overstepping my role within another organisation.

The Head's openness and quick understanding was impressive and perhaps somewhat unusual. However, the incident indicated that there was a shared set of attitudes about challenging behaviour within the organisation and that one member of the organisation, at least, was willing and able to influence change. Although this incident evidenced the effects of coaching on the Head, it could not be claimed that even with his subsequent coaching the same instant changes could be anticipated in other staff. His response was exceptional. He subsequently invited my colleagues to continue this work through a workshop on challenging behaviour. During the workshop, participants struggled with the concept of being flexible to accommodate learner preferences, and there was still a strong belief that learners should comply, rather than staff adapt. This theme is considered further in the sections below relating to tailored learning and learner voice.

Reference to relationships was raised by participants as an important factor in creating high quality provision. However, the study revealed some very different perspectives expressed by participants about people with profound and complex learning difficulties and their roles as members of staff, which impact significantly on the perceived relevance of relationships. For example, a member of care staff was interviewed with the learner. She spoke throughout as if the learner was not present.

At one point she commented on his body odour and started to give intimate details. When she was interrupted, she said, 'It doesn't matter. He won't understand.' Other participants were more positive, but their perceptions about relationships with learners varied considerably. In Stage Two, I sub-categorise this theme which identifies these differences ranging from the above example to 'mothering,' 'adoring', 'mutual co-operation', 'sensitive and professional'. Participants considered social and personal relationships important, but highlighted the difficulties for learners with PCLD in accessing and sustaining relationships which were not with people who were paid to be with them. Staff expressed fears about being accused of inappropriate behaviour in forming relationships with learners who require touch to access communication and activity. The nature of the relationships formed seemed to be varied even within organisations. The organisational culture often influenced the way in which the relationship was described, but **the details of feelings and responses were not consistent within an organisation** and the nature of the relationship formed between staff and different learners was also varied. Organisational culture, policy and practice differed from organisation to organisation. One organisation had a strong focus on learner to learner relationships. The staff often facilitated social opportunities for learners to engage together; another organisation stated an intention to facilitate learner to learner interactions during courses, although there was little evidence of this in OLTs.

This **variety within and between organisations was one of the signposts for considering individual staff development in relation to emotional intelligence and holistic self-development** (Stage Three). Comparison of individual learner-staff

and staff-learner interactions working within one group was carried out across a range of groups and in two organisations.

In one of the groups, the staff were working with learners in a largely staff-led manner. It was an art group and some of the staff were engaged enthusiastically in the art work whilst the learners sat without much engagement. One classroom assistant within the group was working in a completely different way. She was working with two learners, one ambulant, the other in a wheelchair. She engaged both in lots of eye contact, she took note of any movement or sound and responded to it and used these communications to inform the art. She walked around with one learner as needed and asked her to give items to the other learner as a means of enticing her back. They produced very little art, but the learners were certainly engaged. I was interested in this observation because it showed clearly that a member of staff was able to step outside the norm for that group in a way which improved the learners' engagement. Had she received more training than the others, including the teacher? Had she been transferred from a different organisation? Or was she more developed as a person and, therefore, able to find the confidence to work differently and to prioritise the learners rather than the task? This provides an example of the way in which the analysis of the earlier part of the research informed the development of the latter parts; these questions prompted the development of Stage Three of the research.

The examples provided in this section have introduced some of the issues expressed by participants in relation to implementing the key theme of relationships and

communication and indicate the ways in which their contributions informed the development of the research into Stages Two and Three which are detailed later in this chapter. It is clear that there is great diversity within and between organisations in terms of individual and collective maturity. The examples evidence emerging themes, but with significant variation in their implementation. A similar analysis of data relating to the other two key themes follows.

Tailor made learning (including relevant learning and progress, structure and flexibility)

This key theme overlapped with the learner control key theme, which includes comments about approaches and attitudes to individualised learning. This theme focusses on the structures and processes and was inspired by the many comments regarding perceived barriers to personalised learning, as well as observation data which indicated considerable variations in planning and activity. The analysis of the words and phrases used is expanded below in the section on culture and management.

Many participants identified frustrations in trying to be flexible with learners, whilst having to meet stipulations of funding and awarding bodies. This theme emerged strongly in the interviews with participants from a range of organisations, although within the three main participant organisations, this issue was raised less emphatically. Issues of staffing levels were raised consistently, with some participants asserting that it was not possible to be responsive and flexible without sufficient staffing. However, there was a broad range of views on this when probed

further. Some staff insisted that the staffing level was the key barrier, others said that the individual staff members were more important than the number. Within one organisation, an action was carried out to enable an assessment of the impact of increased staffing levels over a two term period. A comparison of observations (OLT) undertaken prior to the increase and in the subsequent term, suggested that an increased staffing level did not impact positively on the tailoring of learning. Further interventions took place in the second half of the term in relation to coaching and matching of individuals, which are discussed below, The result of the increase, prior to the additional coaching interventions, was observed as follows:

‘Lecturer leading from the front. Teaching assistants and students watching.’ The observer noted that the classroom assistants had not differentiated the learning and that some were seated too far away from learners to make this possible. It seemed that some participants were identifying ‘staffing levels’ as a panacea, without considering the need to address practice, in the same way as the Makaton example in the first section (above); it was a frequent comment which had some relevance, but which sometimes was used as a default response. The following post-OLT interview showed an interesting layering of awareness buried beneath the default response.

B - We don't have enough staff in there, it's as simple as that.

C (facilitator) - You don't have enough staff?

B - Yes. We can't go out because J needs 1:1 because he's challenging and J and B are in chairs. S wanders. D and C are ok together.'

Further discussion continued regarding learning goals and support needs, followed by discussion of structure:

C (facilitator) - What are the possible different options for organising the group? Does it depend on who's out and who's in?

B - No. Well, yes in a way. The thing is that I don't want to leave J (staff) because he's not confident and he doesn't know S very well. Also N (staff) needs a lot of direction. Maybe I could use Ja (staff) more, I suppose. It's difficult with that group.

C (facilitator) - Are you thinking that, if you had different staff, say I, G, someone like that, you might be thinking about it differently?

B - Yes, well then I'd have someone to work with S and so that would be ok. Yes. They're not experienced, you know. They need guiding ... You still need higher staffing with that group though.

The dialogue illustrates a member of staff guided through a process of analysis. She was able to consider some alternative structures and she was able to consider individual staff issues, but she reverted to the default answer when the discussion began to turn towards solutions. There were other interviews which followed a similar pattern in that participants, at all levels within the organisations, gave seemingly 'automatic' answers, but showed an ability to analyse when prompted. I wondered if I was influencing or even generating this pattern. However, when I examined the notes again, I noted that I had consistently used a strategy of breaking down generalised answers, by asking about the individuals, learners and staff or others, within the group or situation under discussion.

In one of the organisations (C) several participants stated very low expectations in relation to the people they were engaged with. Some examples of comments were as follows:

M - She can't do anything else because she can't read and write.

E - He needs lots of care. He's not one for the education group really.

J - Oh he spends all his time wandering around; you can't get him to do nothing.

As a practitioner I have heard similar statements many times and my desire to change the understanding of these people is strong. However, putting aside my indignation and probing further produced some insights, which eventually led me to consider the need to offer individual staff opportunities to develop holistically, as discussed in section three below. An interesting feature of these three participants' statements when analysed was not the statements themselves, but the individuals and the contexts. The first statement was from a staff member working in a 'profound unit' of a day centre which offered 'Education' as one of its' options. The participant had previously worked with learners with PCLD in a college, so her comment surprised me. However, the organisational culture within the day centre at that time was disparate. The staff spoke of 'helping users', but there seemed to be little shared concept of organisational purpose. Without a well-defined common purpose, the unit had developed a segregated provision in which the 'more advanced' activity within the main centre was felt to be largely irrelevant to the unit. M's assertion was a reflection of this arrangement. When I probed her further, M *did* have some ideas about the learner's potential to learn:

C (facilitator) - You were mentioning C's way of looking around and interest in people.

G - Do you think she might be able to learn to do more with that, or not?

M - Oh yes. She's always looking at what's happening, 'specially if there's strawberry milkshake coming out!

C (facilitator) - So it comes out over there?

M - Yes.

C (facilitator) - And she looks over there? When it comes out, or before it comes out?

M - Yes. Well, not sure. She does know. Yes.

C (facilitator) - So it's almost like she's asking for it with her eyes, do you think? Or not?

M - Yes. Well she knows it happens then, you know. I was thinking maybe she could use that to do the choices, you know. Two in front of her, like with J.

In this dialogue, I was leading M through a reflective process, but she did indicate some awareness of the learner's potential. In a subsequent (group) interview, she seemed to contradict this statement.

M - Ours can't do that, but it's just different really. Look at J. He does his standing and moving things in the kitchen now, that's after ... not long ... anyway. There's lots more they can do.

I have included the second statement, from E (E - He needs lots of care. He's not one for the education group really.) since comments about 'care' in relation to education occurred in discussions with practitioners within the three case study

organisations, but also featured in the additional interviews with carers. Some of the participants in one of the organisations (A) referred to personal care in relation to individual's learning programmes, but most participants talked about personal care in terms of something which is 'done to' the person, rather than something in which the person might develop skills or communication or sensory awareness. Two carers commented that there was not much focus on care at school. I attempted to have a dialogue with E about possibilities for including 'care' in individual learning programmes eg through using a learner's eye pointing skills to enable them to take charge of the process of changing. However, E was not convinced. Looking back at the notes, I had been general rather than specific in the discussion. I had not drawn out of E the name and profile of a specific learner. This may have been a factor in her lack of engagement with the concept. This reflection pointed the way towards Stage Three of the research, by highlighting the need to **tailor and personalise learning and development of staff**.

The essence of the third comment from J, 'You can't get him to do nothing', was also fairly frequently expressed within two of the organisations (B and C), although only one participant made a similar comment in the third organisation. This comment related more to issues relating to structure and flexibility than progress. There seemed to be an overwhelming desire by many staff to keep learners within set parameters, often seated. In spite of a strong theme of 'choice' spoken by most participants, it seemed that many participants felt insecure about operating flexibly if this entailed moving out of the designated room on an adhoc basis. In this example, the organisational culture issues emerged. There was a distinct comparison in the

perceptions held by staff in different organisations. In the college (A), with one exception, the participants expressed the view that it was appropriate for learners to learn in corridors and outside and to visit other classes.

M - It's his choice. He prefers to move in and out and say hello.

C(facilitator) - So, there's no problem with him being out of the room?

M - No. He's one-to-one, of course. He does his routine, you know. Visits people in the office to say hello. We try to give him jobs to do, collect the register, you know. But then he's expected to come back and do some work here. It's structured on the board, but flexible.

Although this view was shared by most participants in this organisation (A), there were some reservations expressed that there may be assumptions made that the learner was not working hard. There was a focus on setting objectives for the out-of-class times, which had been facilitated by a manager, but he clearly expressed his intention to have the objectives in place to support the process, rather than to restrict it. During the period of the research, the organisation occupied a building with some rooms interconnected. Some staff stated that other staff should not disturb the session by walking through, but it was generally thought to be acceptable for learners to do so. There was one exception: a staff member explained to me that a learner was rushing into the room and 'worrying other students'. However, there seemed to be a broad acceptance here that learners might need to 'wander'. This was not the case in organisation B. The school had locks at the top of the doors, beyond the reach of the learners, which were used to prevent learners from leaving the

classroom without permission. During the time of the study, a learner with challenging behaviour was attending the school. His needs challenged the staff significantly; he was a relatively tall individual and able to unlock doors with ease. He was inclined to move rapidly around school and he was interested in leaving the school premises when there was an opportunity. The staff team relied on the one male member of staff to work with the learner and cancelled his attendance if the male member of staff was not available. The school were very aware that they lacked expertise in working with challenges of this nature. At their request, organisation A supported the new development in a range of ways, including: training sessions, hands-on support, shadowing the staff working with the learner and demonstrating some approaches, and organisation B staff shadowing organisation A staff. The impact of this exchange was noticeable in a comparison of OLT notes. The increased confidence in the staff team was evident, with some staff seeking out the learner rather than avoiding interactions with him. There were still many issues, but they had started to reflect on the need to be flexible rather than constraining or controlling, and the discussions which this challenge presented brought the team together at a time when they were feeling bruised from the regime of the previous Head.

The third organisation (C), the day centre, also differed from the first two in relation to the issue of learners 'wandering'. Unlike the other two organisations, there was less worry about learners wandering. Apart from the 'profound unit', learners here were generally more mobile. The staffing levels restricted flexibility, so that if a learner left the area, s/he would be considered to be off task until s/he returned either independently or with guidance. Often learners returned by a passing manager

encouraging them back. 'Wandering' was not only accepted, but sometimes considered as a positive reflection of active choice:

J - She goes out and sort of takes a break. Then I go and find her, or whatever, a bit later.

In this organisation (C) there was not an expectation that learners would remain on task if they chose to 'wander'.

This **balance between structure and flexibility** was raised as an issue by several respondents in the study, in particular in relation to the demands and constraints of funding bodies and some managers of organisations. The management issues are explored in Stage Two below. Some participants in my research from the FE sector stated that they were still experiencing the pressures and constraints which are the legacy of the targets and awards oriented funding methodology created by the 1992 Further and Higher Education Act (DfE, 1992), in spite of the greater flexibility indicated at that time by the introduction of the Learning and Skills Act (DfES, 2000). I conducted focus group and individual interviews with practitioners and managers from a range of other organisations, as well as the three case study organisations. There was a persistent message from these interviews that participants felt that pressure to gain accreditation reduced flexibility and, in some cases, they considered that offering learners with PCLD courses was not viable, given the funding arrangements. There were also concerns expressed about the difficulties of evidencing progress: 'If he does it three times, has he achieved it?' - which led to a fear expressed by some participants that the learner's 'performance' could be

questioned by others if the learner was not able to transfer the achievement to other settings or people, or was affected by health or medication.

When asked if they could think of ways in which they would like to be more flexible if released from these restraints, there was a broader range of answers, but many cited lack of adequate staff and other resources as an issue. Some staff and managers also said that **the quality of individual staff was critical**. Many practitioners were able to cite examples of 'pockets' of good practice which lie outside of accepted formulae in a given organisation. Reasons given by managers in this study for blocking or prioritising other aspects included perceived pressures from funding bodies and inspectors, and operational difficulties (such as staffing levels) or perceptions about learners as people and their ability to learn.

J - Sorry to say this, but they're not going to get jobs or whatever and some, well maybe they do things more, you know, but they can't do more things, or read or whatever.

Although this key theme was raised frequently by participants in the study, there was very little uniformity of view about what constituted outstanding performance in it. Participants were often absorbed by external or organisational structure issues in discussion, although workshops relating to practice were more successful in focussing reflection on the learner and his/her learning process. I have alluded to the organisational culture and management issues highlighted under this key theme, but the issues relating to individual staff development were also raised in relation to the

individual staff member's ability to be flexible in response to learner needs and also in gaining the confidence and innovative skills to weave the best path through the external and internal barriers (refer to Stage Three below).

Learner control (learner-led activity, motivation and choice)

Some examples of the words and phrases in this cluster included: 'pupil-centred', 'person-centred', 'responsive', 'individual', 'personal', 'making it fit to his needs', 'working together, jointly', 'trying it different ways for different people', 'like follow the leader', 'not everyone does it the same', 'we never stick to the plan', 'she always brightens up when he does that, so we do it at the end of each section.' There were also some comments which indicated views which could be considered contrary to the notion of personalisation of learning: 'She has to learn to do it really', 'he can't be allowed to... if he behaves like that', 'I showed her again and again, but she couldn't get it.' The analysis of the words and phrases used is expanded below in the section on culture and management.

I received an interesting range of responses from practitioners in relation to these issues. Whilst the more recent literature seems to clearly identify the benefits and potential of learner empowerment, some practitioners identified barriers in practice and some expressed doubts, mentioned in the previous sub-section, which reflected viewpoints ranging from lack of conviction that it is possible for people with profound learning difficulties to a) make or b) express choice, to concerns about tokenism and validity, to strong conviction but concerns about accountability. Some participants cited perceived barriers to implementing programmes which enabled learner control

over learning including choice making and evaluation. These barriers included both funding and organisational constraints and also practice issues, ranging from lack of staff skills in being able to implement appropriate pedagogy to lack of critical awareness of the impact of styles of teaching, relationships and attitudes.

Choice was included in the key theme because it was raised by participants at survey and interview stages. In some cases, the discussions relating to choice were similar to the earlier 'default' messages regarding 'Makaton' and the 'insufficient staff' issue. Participants stated that choice was important, but they had not always had an opportunity previously to think about what this means, how to teach choice or how learning opportunities, other than choice of drinks, could be created. However, some practitioners had considered these issues carefully, but expressed worries about tokenism and about the fallibility of taking decisions based on interpretation of learner responses. Some practitioners had developed significant opportunities to present choice for learners and one of the actions undertaken during the study was to create a framework for considering learning about choice and the role of staff facilitation in the learning process (refer to literature review, p44). In some cases, staff would be guiding the learner through the choice process to such an extent that the 'choice' was more that of the member of staff than the learner's. However, this could be clearly shown as modelling against the stages of development in the framework, so enabling staff and others to be clear that it was a teaching process, rather than a pretence that the learner had chosen.

As with previous key themes, there are examples of quite different staff views regarding the importance and nature of learner motivation. Some comments seemed

to reflect a perspective that motivation was the learner's responsibility, whereas others expressed the intention to explore motivators with the learner, in order to build that into the learning. In one of the organisations (B) a manager raised concerns about a particular group and asked for my involvement. The class I observed was chaotic and it was clear that the staff were struggling to give it shape or meaning. During interviews, some staff used phrases which indicated the former perspective on motivation. For example:

S- He won't sit down, always wants to get out the door. He's just not interested in learning.

We devised a series of actions which commenced with an investigation of what each learner enjoyed; we revisited their learning goals with myself acting as interviewer and the learner and staff member answering; and we looked at ways to match the goal and the interests of each individual. This approach seemed a bit like going back to the beginning for the staff, but the learners were engaged and the staff began to look more comfortable as the structure and content emerged. However, there were still many ways in which the staff were not supporting learners successfully. The change of focus did lessen the chaos and staff felt that there had been considerable improvements. However, some of the staff were still rather snappy with learners and tended to criticise rather more readily than investigate and find solutions. A learner in a wheelchair, for example, who was biting his arm, was told, 'Stop it, J' rather abruptly.

A series of actions followed which included some training in intensive interaction, reflective interviews and evaluation discussions. There were improvements. The OLTs show increased learner engagement and in some cases improved confidence in learners and staff. There was a much improved atmosphere in the class, the sound levels were reduced (it was a room which echoed) and on the whole body postures and facial expressions were more positive and calmer. However, I had concerns about sustainability of the improvements. The teacher needed to develop team management and individual coaching skills in order to follow up training on-the-job.

Functional improvements and increased knowledge and skills through staff training were helpful, but the lack of self awareness and relationship management skills (refer to Stage Three) of individual staff prevented them from sustaining effective tailoring of support for learners.

Part of this key theme is 'learner control', meaning control of learning by learners. As shown in the previous example, motivation and control are closely linked in the context of teaching approaches. On the whole, participants were very clear that they should be seeking learner views and supporting learners to become more independent. However, some participants engaged with learners with profound and complex learning difficulties and disabilities (PCLD) expressed and demonstrated some confusion about how to put this into practice. Training and group discussions took place in each of the three main organisations. In some cases, staff had not identified ways in which learners with PCLD might control situations in which they were unable to be independent. Although the training and discussions were largely successful in clarifying the language with which staff subsequently described relevant

activities, it was discussion regarding individuals which was most successful in changing practice. Some of the subsequent initiatives were described in evaluation sessions, as follows:

M - He speaks a bit, but he can only move his head and he's blind, well partially. After that workshop happened, we were saying, ok, we see that someone can do that (eye pointing) to control things, like telling you what to do. But, what about C? Then we went through that same sequence, you know, what does he like? How can we do things but using it? Etc, and we came up with this idea to get him to control the music, like for games or whatever, so that he can control the whole group, you know? So we've been talking to J and he's going to find us a head switch which C could use and we'll try it.

P - Well W is in charge of the parachute game we do now! We all wait for her and when she does that (pronounced) blink, like that, we start. And we wait for her, sometimes for a long time! It's good though.

R - Yes, we've changed some approaches ... C's a good example. When we're in the bathroom, he gets upset really. He doesn't like being changed, he pushes the things away, pushes your hand away. What we've started doing in there is using the intensive interaction approaches which he likes on the mats in the classroom. Right? It takes more time, but we said that he's basically doing the same learning about communication, but in the bathroom.

The evaluations were mostly enthusiastically conveyed, because the focus of the evaluation questions was the benefits for each specific learner. Generic principles and approaches were part of this, but throughout the earlier stages of the study I found that there **needed to be a mix of generic and specific** for practitioners, although this was not always the case for managers. This observation formed part of the basis for **considering both the organisational context and the individual development issues synchronistically**.

I have alluded to the propensity for 'default' responses by some participants and the need for clarification so that participants have a template for developing knowledge, understanding and the associated language to describe and reflect on the issues. The use of language in forming, defining and re-defining organisational culture, practice, classroom interactions, staff reflections has been cited in the literature review (p62) and methodology (p118) and is considered further in Stage Two. An illustration of some issues in the use of language as a tool to express organisational culture follows.

During the process of writing a book about the curriculum in organisation A, the authors of each section participated in two small scale practitioner research projects designed to inform the selection of information given in the book. The first relates to use of language and is explained here in brief, the second is considered in Stage Three below. At each stage, questions arising from survey information, reflections on the literature and events in practice, acted as catalysts for reviewing and making changes not only to our writing and to our conceptualisation of practice, but also to

our practice itself. It was envisaged that our analysis of learner needs and our understanding of how they learn would be enhanced by this sharing of perceptions.

One example of this followed from a process which engaged me initially and which I then shared with colleagues. The 'process' was reading and reviewing the book 'Interaction In Action' (Hewett & Nind, 1998). The reflections in the book seemed consonant with the work that we were doing; it fitted very well with the notion of 'key themes' and also highlighted some of the organisational culture and quality issues which I later decided to investigate further. However, when I looked again at the drafted chapters in *our* book, I noticed that the language used was in places more in keeping with a behaviourist approach than the eclectic, but largely interactive, approaches which we thought we were representing in the chapters. Was this a reflection of our hands on practice? Was this the way we reported our student's work normally? The group discussed the phenomenon fully and decided to highlight the areas of concern in each of the chapters and conduct some practitioner research in our teaching sessions to check the anomalies.

A range of materials were used: existing videos of sessions, samples of objectives, reports and session evaluations and discussions with teaching aides (classroom assistants). In fact, we found very strong evidence in the videos and evaluations that practice was very clearly in keeping with the approaches we were advocating, but we did find that some of the written objectives and reports included some of the terminology and expressions also found in the draft chapters which had given us cause for concern. We returned to the linguistics once again, one to one and as a

group and identified two problems: in searching for the most appropriate style, some of us had reverted to the linguistics of our earlier training. We appeared to be emphasising 'objectives' rather than 'development', the product rather than the process and the reporting style was rather functional and impersonal: 'Dan's long-term objective: become more tolerant of 'waiting' situations'. The second problem was that we had correctly included in the battery of our 'eclectic' approaches use of objectives/skills based approaches for specific skills learning, but that this was implemented in keeping with the tenets of the 'key themes' (learner centred etc) rather than imposed in the clinical fashion often associated with earlier behaviourist approaches (refer to Chapter 1). However, we needed to improve our use of words to reflect this concisely and consistently through the chapters, in order to avoid misrepresenting practice. For example, 'negotiated learning objectives' instead of 'identified learning objectives'. This practitioner research not only helped to clarify our thinking and use of language for the book, it also resulted in changes to the processes of recording and reporting and staff induction.

Stage One provided some initial information which led me to identify some key themes raised by practitioners and managers in relation to their conceptualisation of quality provision. Some of the insights from individual interviews, including discussions following OLTs led to planned actions, such as reflective practice focus groups and training workshops. The actions were evaluated by participants on an ongoing basis, so that each stage of action was informed by a further layer of reflection. Some of these processes have been included in this section, but I have focussed on those which most clearly informed the planning of Stages 2 and 3 which

followed. **The key point identified in Stage One is that although there was a great deal of consensus of what makes the provision of high quality (ie the ‘key themes’) there is not a unified response to the key themes.** This led to an investigation of the organisational contexts in which the key themes were manifested differently. In Stage Two, below, I highlight the data relating to organisational behaviour. At this point in the study, I was seeking to probe the issues raised by participants relating to ways in which the environment in which they worked facilitated or created barriers to implementing their perceptions of good practice in relation to the key themes.

Stage Two: Organisational Culture and Management Practices

Having identified key theme clusters, I investigated participants' views of the meaning of 'quality' in each of the key theme areas. As one of the actions, I used the process of developing a 'shared concept of good practice' (refer to Literature Review), to establish views of the constituents of good practice within each organisation.

In addition to the shared concept of good practice focus group workshops, I reviewed the interview data to identify aspects of narrative which could provide insights into the organisational culture (refer to p48 re storytelling, in the Literature Review). Some interviews were carried out directly by myself, some by other people within the organisations (refer to p128 in the Methodology).

Figure 3.2: Example of focus group brainstorming notes

To provide an educational service, which offers equality of opportunity to all students and staff.

- Always come down to students' level physically.
- Visual impairment – don't tiptoe around – warn students of sudden noises.
- Wear plain clothes.
- Always respect student's decisions.
- Respect student's dignity.
- Be cheerful and positive when speaking on the telephone.
- Go slowly. Give student time to respond.

To respect students as individuals and adult learners.

- Always let the student know you're there.
- Make praise meaningful.
- If you need to talk to a member of staff in a session, introduce yourself to student too.
- Don't talk over students.
- Respect student's dignity.
- Don't give students negative ideas, eg 'You don't want to tip the chair over, do you?'
- Always respect student's decisions.

To provide learning opportunities within a framework which is flexible and responsive to individual needs.

- Build up the concept of things in order to make choices.
- Don't offer a choice when there isn't one.
- Don't overload with choices.
- Use objects of reference.
- Reinforce choices with the smell.
- Think about natural light and positioning.
- Use key words.
- Try things more than once.
- Try things in different ways.
- Visual impairment – don't tiptoe around – warn students of sudden noises.
- Minimise background noise and distraction.
- Go slowly. Give student time to respond.

To aim at all times to establish quality relationships and interactions, which reflect the students' adult status and ability to learn.

- Always let the student know you're there.
- Always come down to students' level physically.
- Always be aware of the tone of your voice.
- Don't stand with your back to a window when signing.
- Use same perfume/aftershave.
- Don't talk over students.
- Use key words.
- Use objects of reference.
- Go slowly. Give student time to respond.
- Think about eye contact and consider facial expression – (student + staff).
- Respect student's dignity.
- Be consistent with your personal ID's.

As mentioned in the section on learner control above, one of the key features of the data was the use of language in reflecting and steering the organisational culture. The process of clustering the words and phrases used by participants not only helped to identify the key themes, but also demonstrated the ways in which words could lead to confusion, such as the examples of organisational 'rules' given in Stage One. **Words were sometimes used deliberately, with self-awareness, to reflect cultural norms.** Participants rephrased their narratives in mid-flow at times, in order to reflect nuances which enabled the language to better capture the organisational culture. For example:

J - I want her (the learner) to have the opportunity, well *she* wants to have the opportunity to try it out.

In this example, J realises that he has expressed this as his own preference and changes the words in the second part of the sentence to express it in terms of the learner's preference.

B - A (the learner) likes to go around the College in the frame ... don't you, A?

In this example, B has been speaking on behalf of a learner. She changes the emphasis to explicitly include the learner after a momentary pause, by turning the statement into a question addressed to the learner.

One of the signposts to Stage Three of the study was prompted by the use of language by participants. It was apparent in the 'relationships and communication' cluster in particular. Although participants discussed functional aspects of communication, **there was a considerable selection of words and phrases which indicated a deeper level of communicating, intuitive and emotionally aware.** For example:

'Transfer her thought', 'his eyes say it all', 'it makes a twisty feeling in my gut when she does it', 'his face is like a map of his feelings', 'every time he heard her voice, he smiled'.

Additional interviews were carried out in which participants were asked to recount memorable episodes in the life of their organisation (refer to critical incidents in Methodology chapter). I used a matrix analysis format (Martin, 2002:4) to identify

manifestations of the culture within each of the three main participant organisations.

Some examples are given below and in Appendix 5.

The matrices highlighted that the key themes: relationships and communication; tailor made learning; learner control, featured regularly in critical incidents described by participants and could be additionally identified through observation of practices and physical arrangements. The critical incidents described by participants provided information about the culture and management practices within each organisation, depicted through rituals, stories, humour, jargon, physical arrangements, formal

Content Themes	Practices		Artefacts			
<i>External/ Internal</i>	<i>Formal</i>	<i>Informal</i>	<i>Stories</i>	<i>Ritual</i>	<i>Jargon</i>	<i>Physical Arrangements</i>
Relation-ships between learners & staff made explicit	Relationships & communication between staff & learners identified in core principles statement, recruitment criteria, induction, training cycle	Norms re accepted ways of talking to and about learners reflected by incidents	Story of student A's 'promotion' Story of feedback from visitors	Everyone stops for tea with student		Non-formal class layout
Perceived ambiguity of roles	Job descriptions show clear delineation	Swapping of roles flexibly to suit students	Story of assistants leading in teacher B's classes		Acting-up	Hot desking used at all levels

Figure 3.3: Manifestations of culture within participant organisations

structures and policies and informal norms and practices. In particular, they drew attention to the ways in which management do, or do not, endeavour to influence the underlying value base of members of the organisation. In this section, I summarise the most dominant issues raised by participants and the ways in which these reflected or influenced organisational culture. Together with the key themes in Stage One, these provide a context for Stage Three.

In organisation A, there were some very clear messages interwoven throughout the data. Participants spoke frequently and with strength of belief in their intonation about the 'students' (with PCLD) being at the heart of the work. Examples of critical incidents for participants in this organisation included the following:

A - He was doing really well, but when he was out in the community satellite venue, he just found it really hard and started to be challenging.

C (facilitator) - What happened?

A - Well, y'know, he threw things and made lots of loud noise etc and we had to clear the other staff and students out of the room and just me and J were there talking him through. We got him out eventually and he was ok then. We tried everything, you know, different structure, talking it through etc. We were also worried about the reactions from the old ladies there, y'know. They were all very nice, but it happened three times in a few weeks. We explained etc. But, the bottom line was that he wasn't comfortable there and it wasn't making a good thing for him, as well as the others etc.

C (facilitator) - Yes.

A - Anyway, we did risk assessments and all that, and we decided we needed to bring him back here (main building), but we needed to find something to come to which wasn't ... didn't feel like a step back. He would be very aware of that. So we got it organised so he can work in the office here. No problems! He just loves it, you know, talks to everyone, sorts them out. We got a special chair ordered. Yeah. It worked for him, ended up the better option anyway!

In this example, the member of staff was recounting ways in which she had facilitated a more appropriate physical and supportive arrangement for a learner. The incident indicated that the staff, and the organisation, were sufficiently flexible to accept that the student's challenging behaviour could be his way of communicating that they needed to rethink his provision. Another example from this organisation follows:

C (facilitator) - So, are you saying that H (new member of staff) is not supporting the students appropriately, because of her attitude?

D - Yes, but it's even more than that. I've been in, modelled it, talked through it, joined the evaluations, you name it, for two weeks. But my assessment is that it's not safe in there. She's just not able to see it coming, and she feeds it by trying too hard to wade in.

C (facilitator) - She's not familiar with challenging behaviour of this level, so she's not tuned in?

D - Yeah exactly. Look at J (learner). He's one of our success stories in the making! He's really, really challenging at the moment, but he's so going to be our shining star!

But she's never going to be able to see that right now; she's focussed on the behaviour instead of the J inside it.

There were several examples from this organisation following this theme. **The managers within the organisation were very clear about the ways in which this value base was perpetuated.**

V - We use everything we can, formal and informal, to keep that message going: 'We're here for the students.' We get everybody to re-look at the mission and vision every year and we get them to identify *how* it happens and what we should do more of. We always say '*for the benefit of the students*'. It's our mantra. But we believe it, too. Plus there's lots of informal stuff. We get staff to own it, by involving them in the developments. And, if someone isn't doing it, they just tell us basically.

C (facilitator) - What happens if someone's not doing it?

V - Well, we ... well, it depends what it is, of course. It could be something like they're talking down to students, or talking over their heads, or a bit childish, you know, not age appropriate. Then, we work on it with them, tell them. Get them to be aware, if we can. A lot of it's modelling it and then picking it up in the end of day evaluations.

The examples above relate back to aspects of the key themes, such as flexibility and tailored learning. However, **the critical incidents demonstrate ways in which the key themes may be interwoven into the fabric of organisational culture.** The manager (V) is alluding to a number of manifestations of organisational culture: she

talks about formal and informal norms and practice and 'ritual', in the form of a 'mantra'. She is clear that the shared belief in the organisation's stated core purpose does not just exist, but requires deliberate cultivation. She also refers to 'modelling' and 'work(ing) on it with them', which links to the process of coaching which is explored further in Stage Three.

Within this same organisation, some of the critical incidents were recounted with humour and/or drama (refer to Methodology p162). There appeared to be two primary themes in the humour/drama arena: 1) relating to the relationships between managers and staff and, 2) relating to identification of learners and staff *together*, compared to 'outsiders'.

There were several examples in the first category which commented implicitly on the need for managers to *be* managers with members of staff who require the sense of security and clear parameters of a clearly defined relationship. Three different examples follow:

I - It happened a while ago, can't remember when. This woman was wobbly, anyway. She'd started as a teaching aide and was good with students and everything, really. Very good. But, you know, lost it a bit really. She was working with K (manager) doing a course there and she really enjoyed it and said all the students were doing well and she was learning lots and she liked it and everything. But then she went off the rails a bit at one point. She had (home) relationship problems and things. Anyway, she was in a meeting with us - there weren't managers there or anything -

and she just started getting nasty about K (manager). Anyway, everyone knew that wasn't right; K's very strong and a very good teacher. So, J didn't get any support from the group or anything, so she ran out crying and everything.

M - What about K?

I - We don't think anything happened really, but they'd been working together a lot for, you know, a while and K was relying on her, I guess and she couldn't like take it.

The second example also features issues relating to a manager-staff relationship.

There are two extracts, first in which the staff member is being interviewed, the second in which the manager is being interviewed.

D - It's just not on for S to expect us to turn up there only to find that we're supposed to be in another place and he just hasn't told us.

C (facilitator) - What's the key issue for you in that incident?

D - Well, it made me feel like I'm not important. He just shrugged it off when I spoke to him. I'm not here to be treated like that.

This is a short extract; the interview carried on to explore what actions K expected and the sequence of events. But this extract demonstrates K's strong feelings about an incident, feelings which were also reflected in her stiff body, red face and neck and clipped tone. The next extract features the manager, S's analysis of his behaviour and D's reactions.

S - Yes, erm (pause). It's one of those situations which I haven't handled right. K has opened up a lot to me about her issues outside work, her health and long-term erm issues. I was thinking that I was being supportive, you know. But, I needed to ... well, *she* needed me to step back and be more, well, formal really. I've got a tendency to crack a joke or be, you know, a bit too relaxed, especially with D because we've worked together and all that, but she doesn't need that really; she needs like a rock which she can lean on, bash, swear at, whatever! It's my target for next year, be less flippant!

The difference in level of self-awareness and analysis between S and D is considerable. S was able to analyse the issues with reference to his understanding of D's perspective and he had identified ways in which he might change his behaviour in the light of this insight. In contrast, both in this extract and in the longer dialogue, D kept dogmatically to a 'I'm right, he's wrong' stance, without showing any ability to analyse her own reaction or his actions any further. The extract indicates an expectation of managers' behaviour which was consistent with that of other participants at junior levels within the organisation. **The expectation that managers should be able to work intuitively and collaboratively with learners and staff in direct teaching situations, but maintain a more distanced, formal role when not engaged in teaching.** However, this was not the expectation necessarily of qualified staff and middle managers. Their expectations seemed to be less straightforward. For the most part, they welcomed strong leadership and direction, even if they disagreed with it or felt unsure. However, they held senior managers in positive

regard for showing a sense of comradery, humour and willingness to behave as part of a collegiate in certain, but not all, circumstances.

P - It was so funny. I'd just applied for a promotion. It was lunch time. I'd been called in to help with T (learner) 'cause she was about to go into one. Anyway, she just loves, you know, play acting. So I'm her man really! There was I crawling along on all fours, sort of acting the fool a bit, and there was this side door from the courtyard there and in walks V - the boss! So everyone's watching and I'm practically at her feet and she just stands there and everyone holds their breath, you know, seeing how she'll react. Anyway, I slowly look up from her foot to her face and say, 'Oh hi there!' and get up and she just stood still and raised her eyebrow and looked amused! Then, two days later, there I am standing on a chair to get something hooked into the ceiling for J for a display in the corridor and along she comes again! I actually blushed! She said, 'Interesting interpretation of health and safety, P,' with the same eyebrow up, amused look on her face. I died! The thing was, I was doing it so that J wouldn't get up there, but anyway, it worked though, I'm not likely to do that again!

C (facilitator) - Did you get the promotion?

P - Yes, I did. That was another thing. I got asked something about how to ensure safe practice or something, in the interview! Don't know if it was deliberate or not! Probably was. The thing was though, the first time was ok if everyone knew it was about T. But the second one wasn't. But she knew I knew, I guess.

These extracts give a flavour of some of the critical incidents related by participants about management-staff relationships. The last extract indicates that there is a clear line management, but that the approach to management was to facilitate staff reflection on these instances, rather than to instruct or reprimand. In the case of P, it seemed effective, whereas in the earlier example, the member of staff wanted more clearly explicit management comment. Therefore, within the same organisation (A), **managers were expected to differentiate management strategies to accommodate the needs and understanding of the member of staff.** This differentiation is explored further in Stage Three, below.

The second arena for humour/drama incidents within this organisation related to identification of learners and staff *together*, compared to 'outsiders'. There were a range of critical incidents accounts relating to this theme. Some examples follow:

M - D went to the music shop with J (learner). She was picking out CDs and looking at them and putting them back. The shopkeeper went up and said not to touch them! D was fuming. She wasn't doing anything *at all* inappropriate. She was just looking like anyone else. Of course, he didn't know she can be challenging as well! (smile) Anyway, she chose one so D put it to one side and when he turned round it had disappeared. D thought, 'Oh god, just what we need!' Anyway, turns out, the *shopkeeper* had taken it and put it behind the counter 'to keep it safe', he said! Anyway, he's potentially lost rather a lot of business! (M has a reputation for buying lots of CDs).

P - Now some of them are really supportive. But then we called them the 'anti-rampers'! We spent six months going to meetings with people who didn't want us to put a ramp at the front of the building. In spite of explaining the Disability Discrimination Act, the needs of our learners, the benefits to everyone, pushchairs and such-like, they still tried to stop it. They wanted us to go in at the side entrance, just so the front aspect of the building wasn't disturbed. Anyway, we got there eventually. We did have a few jokes about it along the way - better not repeat them!

There were a number of examples of this type given by different participants in the organisation. They featured as critical incidents due to their importance to the participants in terms of their own indignation at perceived injustice. These incidents were all recounted with some element of humour; they had become organisational myths, serving to provide a common ground for learners and staff together as one in the face of adversity. Each story provided a means of comfort that others within the organisation experienced similar difficulties, that 'the world out there' did not always understand, but that the social group to which they belong does understand. This common ground offers a sense of group identity and 'belonging'. Managers commented that they actively encourage the recounting of incidents:

P - I prompted him to tell the tale again at the IPM (teachers' meeting), actually. It lightens the atmosphere, but also it reinforces that we all need to keep chipping away at attitudes and barriers and not let it get to us either.

In organisation B, some of the dominant stories also related to the 'insider versus outsider' issues. There were also accounts of critical incidents pertaining to the previous regime and recent change process, and a focus on staff roles and relationships, role of unions and informal leaders, and the challenges of changing learner profiles. At the time of the study, I described the culture of this organisation as 'bruised'. The previous Head had been in post for some years and had been autocratic in her leadership style. Participants reported that she had controlled all the decision-making within the organisation, including many of the smaller details. She had suffered with tension and exhaustion and had been absent for several months prior to departure.

T - She used to listen in on our conversations through the intercom system.

C (facilitator) - What?

T - She used to listen in, because she wanted to know what everyone was saying. Sometimes she'd suddenly butt into the conversation through the intercom!

In spite of this extraordinary level of scrutiny, there had been little formal OLT. The introduction of increased formal monitoring systems was one of the changes which the new Head and SMT were implementing at the time of the study. One of the actions requested by the Head included my involvement in facilitating agreed OLT criteria and formatting and carrying out observations as an external observer. The information provided by participants in relation to the previous regime was helpful in informing my approach. I was careful to be very clearly consultative and collaborative

at every stage, hoping to dispel concerns which might have arisen following their recent experiences.

B - If she didn't like you - that was it. You were out.

I engaged in a range of immersion activities: attending meetings, wandering around and chatting in the corridor, helping out hands-on in the class, facilitating workshops and reflective discussion (focus) groups, individual interviews, as well as OLT and feedback discussions. To some extent, I was attempting to adopt an anthropological approach, but I was also focussing very deliberately on my manner, on gauging responses and reaction, and adapting, exemplified by an extract from my notes:

Probationary teacher. Might be under-confident?

I walked in smiling warmly, said hello.

She wasn't sure how to handle.

I asked if ok to join in. Smiling lots!

She looked relieved, carried on, glanced at me surreptitiously few times, made sure I was smiling and engaging with pupils.

Good class, doing drama game, good layout, fun atmosphere.

One TA getting stressed because pupil opting out. I helped in low key way, got smile and eye-contact from the teacher.

This was just one example, but it felt as though the organisation as a whole required significant amounts of reassurance and confidence building. As the study progressed

during the year, staff increasingly initiated discussions with me. They tested out ideas on me and asked for comparisons in approaches in my organisation. In turn, I was able to facilitate greater communication between the staff team through a series of facilitated focus groups which continued after my departure. It seemed that **the early focus on demeanour and reassurance had been important in building bridges.**

The notes from my research diary reflect a 'critical incident' of my own which, alongside others, informed the development of Stage Three of the study. It seemed particularly important within this bruised organisation that I should be perceived as a support and a professional ally, and that I should facilitate the establishment of the new management. Although I facilitated some of the reflective discussion focus groups and worked at a practice level with staff (refer to Stage Three), the actions designed to address the key management issues below were led and implemented by the management team.

The interviews with the new leadership within the organisation contained considerable amounts of dialogue indicating a wish to dissolve features of the culture which were perceived as divisive barriers to team working, as shown in these (separate) extracts:

F - There's a lot of 'them and us' stuff which we need to address. R used to rule everything, you see, and they don't use their initiative. The curriculum leaders are very patchy. Some are ok ... but there's some who are just not producing the work. We need to look at the paperwork overall anyway. You'll see when you go in. Be interesting to see what you think actually.

F - I'm trying to work with the unions, but it's not easy at times. 'Specially with D - she's a very difficult lady to get along with and she stirs. I'm not at all against sorting things out for the best, but sometimes they're just making it unnecessarily difficult ... They're not working *together* really. The teachers won't do the changing and they don't involve the assistants in the planning. Like you saw in J's class, the resources aren't to hand, like you say, probably because she's not getting the TAs involved in the preparation enough.

There were also some issues relating to vacant posts, and members of the management team were covering classes when other cover was unavailable. At the same time, the managers were attempting to introduce increased curriculum leader work, increased formal systems of OLT and improved planning and recording. They were also grappling with the school self assessment and development plan, and they were worried about how to present and justify fluctuations in pupil attainments. If permission was granted by participants, I shared some of the key points and critical incidents stories with the managers. This prompted discussions about issues to be addressed in improving team relations and performance and ways of introducing or enhancing formal systems. The managers were very clear about what they considered needed to be addressed, but at first seemed under confident about addressing the issues:

C (facilitator) - Were you planning to run a day with all the staff looking at the school development plan?

F - Sounds like a good idea. With all of them?

C (facilitator) - Yes, that would be good. You could get them all to come up with your core principles and what you want to achieve. Might pull them together.

M - Is there a format we could use?

C (facilitator) - Well, you'll probably want to match it to what's best here, but you could look at F doing a rousing beginning - we're all here for the pupils etc. Then you could get them in groups brainstorming the core principles and make a big thing about recognising their achievements so far etc, then do some group work around the objectives for the development plan, perhaps? We could plan it in detail together if you like.

At a later stage, I was able to follow up on this discussion with the Head. It was not typical of the other discussions I had witnessed and engaged in with the managers in this organisation. Although they frequently sought advice, they normally did so within the context of comparison or ratification of their own ideas, but in this discussion they seemed to be at a loss, almost blank. I later included this discussion in the critical incidents section of data, because it prompted a further set of accounts reflecting their recent history as an organisation:

C (facilitator) - Were you happy with the discussion we had about the staff development planning day?

F - Yes, it's fine. No, it'll be good, I think. It's a good idea. Getting everybody together.

C(facilitator) – Oh, ok, I wasn't quite sure if ... (gesture)

F - No, no, it's fine.

Later in the interview, F returned to the subject of the discussion:

F - You know when R used to get everyone all together, it was always a nightmare. One time she was getting us together for something or other, I forget what it was now, and she went on and on about loads of stuff with transport and escorts and the school journey and things. Anyway, then she just kind of picked on M and went on at her about not organising the arrangements for exit at the end of the day, you know with the front door and all that business. She just went on at her in front of everybody. It was very tense ... It always was very tense, when I think about it. You never knew what the agenda was. There wasn't much discussion between people, you know, like you were talking about the other day, you know? She meant well, you know. And she did a lot. But, she was just too controlling really I suppose, so nobody got much of a look-in, you know. Well, sometimes, I suppose. But not like that, in a group.

This narrative provided a context for the apparent disengagement with the earlier discussion about a staff planning day. On a rational level, the managers had said that the idea of staff coming together for planning made sense, but their previous experiences had shown through in their unusually disengaged behaviours. I facilitated some further focus group sessions with this group of managers, in which we together analysed some of the strategies which they might use to change the culture to a more collaborative style. They wanted to gain the trust of the staff and

they expressed worries that the improvements identified in relation to curriculum co-ordinators and practice issues could cause further tensions. The strategies included consideration of the way in which the staff planning day would be talked about, and staff involvement in presenting different sections, with a focus on the harder-to-reach staff. The physical layout and organisation of discussion groups, how to facilitate discussion, techniques for demonstrating that each person has contributed and been heard, were also considered. It is not my intention here to rehearse the strategies discussed and implemented in detail, but to use this as an example of some of the issues relating to organisational culture and management. **Without addressing these issues, it seemed that the ability of the organisation to address quality improvements relating to the key themes would have been significantly diminished.**

The staff planning day was enormously successful. Evaluations from staff, both formal and informal, were positive. It generated quite a buzz and the people seemed energised the next day, walking purposefully, talking more animatedly. The managers felt they had turned a corner.

F - There were some tricky moments. We nearly got hijacked by the time and workload issue at one point, but it was fine, we worked through it. I had to move it on a bit, but we managed to bring the focus back on the pupils each time, which really worked. There's still a lot to do, you know, but it's alright. It's alright.

Organisation C had a much less homogenous culture. The participants in A and B largely reflected some commonality in their views of the organisation and its ethos. There was a sense of shared purpose. This is not to say that participants agreed about everything or that they had the same perceptions, but that there were some common threads which emerged strongly from the majority and which were not contradicted by those that did not espouse them. In organisation C there was commonality in that the participants expressed a commitment of some kind to the learners with learning difficulties/disabilities, but their perceptions of the fundamental nature of the work and the organisational purpose were very varied.

This organisation was operated by a Social Services arrangement. Some participants considered that the primary goal of the organisation was to help people to develop skills for life. Other participants stated that the organisation gave people with LD something to do, an occupation. A third set of participants viewed their main role as providing care and 'activities'. There was a functional focus to many of the critical incidents stories, with participants illustrating difficulties relating to lack of staffing, transport issues, budget issues. In common with the other two organisations, there was reference to external people, parents/bodies lacking understanding and creating barriers.

The Head of the organisation had a clear view about the potential for development. His aspiration was to reduce the size of the current centre and replace it with smaller units with a vocational focus. The other participants were aware of the smaller unit which had already commenced, but their level of engagement with the potential

future as envisaged by the Head was minimal. The Head's primary focus in interviews was the project, the lack of support from the Social Services department and the budget difficulties. There was a very clear delineation between his role and the roles of the other managers. These two women were focussed entirely on operations, referring to the project as 'G's bag'. G's critical incidents were focussed on these key concerns. He recounted several narratives concerning support and budget issues. For example:

G - I can't even get them to come here. Councillor B was supposed to, but didn't. It's a frustrating time really. If I'm going to make these changes happen, I need to resource them, but then I went in last week to meet E and she told me that we're getting a 20% cut! It's just unbelievable. S is all very well; he says all the right things, but he doesn't know how to put it into action. The first time I met him, E was taking me through to her office and you have to go past his desk, so E stops and introduces me to him, as you would, you know. It was the first time we met, so you'd expect 'Hello, nice to meet you.' No, he went on and on and on about how he wants to move everyone out and how rubbish everything is. It was just really strange, I didn't know what to think. But, every time I meet him, it's the same. The vision, but no meat on it.

C (facilitator) - Have you presented the business case formally then or hasn't it got that far?

G - No. Well, I've explained about the park projects and things, but I can't see how to do it with even less money.

The other managers were aware of budget constraints and the other participants were aware of cuts, but their key issues were more functional. Their narratives featured details of anecdotes, such as the night when D, the organiser of the weekly disco, failed to turn up, and the chaos which followed as nobody knew where the key to the cupboard with the disco equipment was kept. There were several stories about transport, including some success stories relating to travel training, and many frustrations regarding the system of minibuses which took people round for an hour and a half, picking up all the passengers, before arriving at the centre. The issue most commonly raised was lack of staffing. In addition to restricted numbers of staff due to budget cuts over the previous two years, participants commented on the number of staff who were sick. There were some narratives relating to organisation heroes, who were keeping things going in the face of this adversity, for example:

J – Yes, he's a trooper really. He's very nice to everyone, and yesterday D asked if someone could cover in the workshop as well and he was 'Yeah, no problem.'
There's a few of us who do our bit, you know, keeping it running.

The Shared Concept of Good Practice workshop which I had run in the other two organisations was carried out differently in organisation C. It was not named in this way and it was not possible to gather all the staff together at one time. The unit for people with PCLD was viewed as a separate entity, so I had broadened the scope of inquiry in order to consider organisational culture issues. I carried out the workshop within this unit and with a small group of staff in the main centre, separately. Attempts to facilitate learner access to facilities within the main centre, or exchanges of views

between the centre and the unit staff, were firmly resisted. There was only one ordinary door between the two, but this felt like a closely guarded boundary. However, there were advantages to the unit in remaining separate. They had secured some protection from the effects of cuts and staffing issues and they had been able to develop a closer knit team. It was interesting that in the time I was carrying out the research, I rarely saw the managers enter the PCLD unit.

The research carried out in other organisations gave some clear insights into the benefits and difficulties of collaboration. In the third organisation, staff in the main unit wanted to explore ways in which they could implement programmes relating to literacy and numeracy which had been requested by the learners. The organisation requested a practitioner research action in which I would assist them with this project. There were many difficulties encountered in the implementation of the project. The staff had not been trained in this area and lacked skills, knowledge and confidence. The organisation did not provide for preparation time and budgets for acquiring equipment and materials were very limited. There was also a lack of person centred planning, which resulted in isolated activity, rather than the use of literacy and numeracy linked to relevant other activity and life goals. During the series of planned sessions, it was clear that two out of the three staff involved were able to acquire some additional knowledge and practices. Evaluations showed that learners were very positive about the work and that the staff had also altered their perceptions of their roles. Part of the reason that this worked well may have been due to the view of the organisation, voiced by several of the participants, that I was there to help them,

which was reinforced by a critical incident mentioned by three participants, in which I was perceived to have 'rescued' the managers from 'difficult' parents.

However, participants also provided a contrasting example of collaboration relating to this organisation. In this example, the organisation was concerned that the needs of C (learner) were not being met and his challenging behaviour was escalating. He also attended another organisation (E) which was successfully progressing with C, with reduced challenges and increased participation. They commissioned a consultant from another organisation to do a specialist assessment and initiate a programme of support for staff and C. However, the specialist consultant devised a behaviourist style programme which included two staff prompting the learner to remain seated whilst he engaged in table top puzzles. This intervention was not acceptable within the culture of the other organisation (E). However, the staff in organisation C welcomed the specialist's engagement. It seemed that the lack of clear mission and organisational principles in organisation C resulted in them welcoming *any* help, ranging from my person centred approaches to literacy and numeracy, to the sort of intervention used with C, which would not sit comfortably with the former approach. This indicated that, in keeping with Tavistock's notion of the 'cultural island' (Elsmore, 2001:43), if a person or group of people are exposed to new thinking in one set of circumstances, it will not necessarily result in a change in behaviour; it is only if the organisational culture shifts to accommodate and reinforce new thinking and behaviours that there may be resultant change.

A common theme from participants' experiences of collaboration was the reliance on certain individuals in maintaining collaborative momentum. There were many stories of the collapse of joint working due to the departure of a key individual, which served to underline the issue raised throughout, that there is a strong relationship between the culture of the organisation and the impact on it of each person within it.

In this section, I have provided some examples of the ways in which the research led me towards Stage Three. Following on from the key themes work, I had originally expected that I might work towards developing an organisational model which would be conducive to developing high quality provision for learners with profound and complex learning difficulties/disabilities. The notion that the key themes alone could provide the basis for quality was unsubstantiated, the organisational culture too was shown to be a key factor in providing an interactive supporting layer for the implementation of the key themes. However, **the themes and patterns of development uncovered during the second stage indicated a complex, multi-layered, dynamic, at times chaotic, set of processes. It seemed more appropriate to develop a paradigm which allowed each organisation to be able to develop holistically and synergistically and to draw from the unique circumstances of each learner, staff and organisation a range of strategies and learning processes, rather than to attempt to confine growth and development to prescribed criteria.**

Returning to the learners' views of quality, it was their minute-to-minute experiences which were important, and it seemed that whilst these organisational dimensions

formed a fundamental supporting structure, **it was the interaction between individual learners, their peers and staff, which was the root of *their* experience of the provision.** In Stage Three, I focus on the area of development of each individual staff member towards enabling interactions to comprehensively reflect the key themes in a way which responds to the individual talents and needs of each individual learner. **From this person-centred focus, I identify the strands of connection between the learners and staff which may be woven into an integrated whole to dynamically define and refine the organisation in a multi-faceted, reciprocal interaction which may shift synchronistically with each new circumstance.**

Stage Three: Emotional Intelligence and Holistic Self-Development

The preceding stages identified some key themes which encapsulated participants' views of quality issues and which resonated with the literature. Whilst the key themes often emerged from discussions about teaching approaches and interactions with learners, the imperative of addressing the broader organisational context in order to nurture the development of quality was also strongly featured. It is not surprising that this complex layering was integral to a study of organisational behaviour, but it was interesting to note that each time an action, or set of actions, was planned to address a key themes issue, then an organisational issue would emerge and vice versa. However, at every stage, as exemplified in the summary of data in the stages above, the issues of individual members of the organisation, their abilities, personalities, views, compliance and performance, were raised. Whilst the actions taken within the research period continued to be an eclectic mix of observations and feedback, group

work in various forms and one to one discussion, interviews and coaching/mentoring, the focus on the latter was far greater in relation to the third phase activities.

Following the discovery of relevant literature, I began to contextualise investigations of individual staff variances in responding to key themes, not only within the organisational culture dimensions, but also within the individual emotional intelligences (EI) dimensions.

I began exploring with participants **the possible connections between individual staff's 'emotional intelligence' and their ability to implement the tenets of the key themes in practice** with a range of individuals with profound/severe and complex learning difficulties and disabilities. I should emphasise that I did not use the EI competencies in isolation, but over layered them with relevant key themes data from observations. It was not my intention to adopt a predefined approach in exploring these issues and so **I have used the term 'holistic self development' to represent the drawing together of functional skills development and other forms of self development, including emotional intelligence development. I have used the term 'holistic and emotional intelligence' in reference to the entire range of development strategies and activities which may impact on holistic self development.**

In phases one and two above, I have indicated the way in which participants' reflections and narratives led me to this route of exploration. I was mindful that the organisational culture itself would be influenced, indeed formed and re-formed, by these individual dimensions, too. It would be an over-simplification to describe these

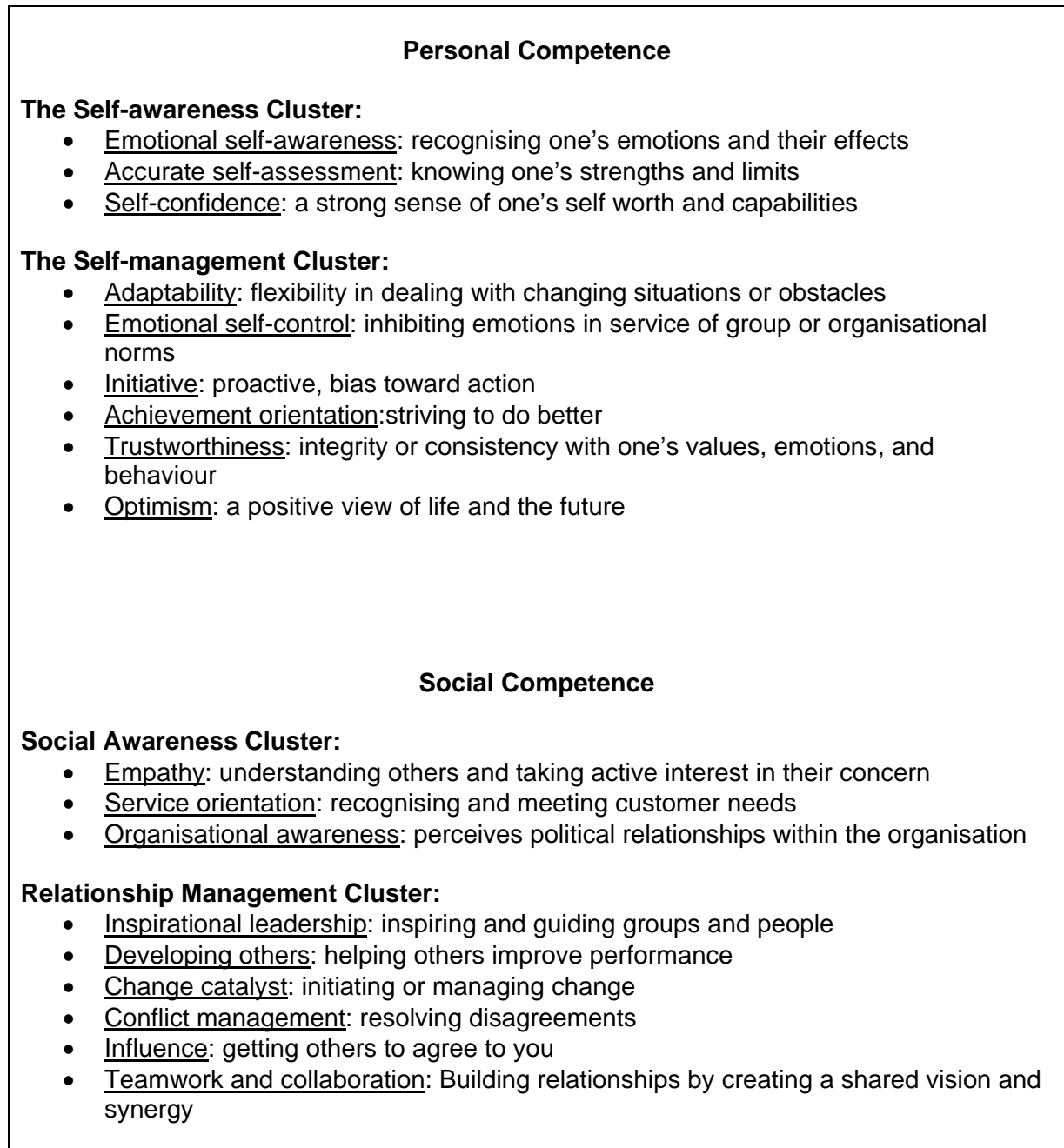


Figure 3.4: Emotional Intelligence Domains and Associated Competencies

(Goleman et al, 2002: 47)

complex, interconnected phenomena in this linear manner, but by way of explanation, I was considering *if* the participant and organisation had some level of synchronicity with the key themes *and* the individual staff member had received

appropriate ongoing levels of skills development, such as through training in teaching and learning, reflective practice opportunities, mentoring and support, *why* is it that her behaviour is more/less responsive to individual learners than her colleague who has participated in the same type of development? As a practitioner-manager, my ontology was that I should always try to improve to benefit learners and that as a colleague and manager I should support others likewise. As I began to explore this area, I noted that some of the participants expressed similar viewpoints, but others expressed quite different perceptions and beliefs. Some example extracts follow. The first two are those in which participants express a view that the person will not change:

Extract 1: G - She's always been like that. When I first arrived she was really difficult, you know, rude and quite aggressive at times. I think she'll always be like that; it's just her nature.

Extract 2: S – Yes, ok, maybe we can help her to be more aware that she needs to go through appropriate channels and not just wade in, but you won't change her personality. She just wants to interfere all the time and can't help herself.

The next three extracts, all managers but from two different organisations, also indicate that the people discussed are not going to change. However, they both refer to processes which indicate that they consider that there are underpinning developmental processes of self realisation and facilitative actions, in spite of the

circumstances in these cases, which they consider require change beyond their remit or organisation.

Extract 3: C - She's got to go. She's gone past it; she's just got to realise it and move on.

Extract 4: M - We've got to do what we can with her. To get her to see it. I know. But ... Yeah, I know you're right; we have to go through that type of erm process anyway. And we should. But, I'm not going to say this, obviously, to her. But, I just know she's not going to get it. You know, we've done so much, the feedback, the training, the stuff she did with D around taking it from the student not from her, but well ... maybe I'm wrong. We'll see.

Extract 5: M - It's good to see, isn't it? I felt uncomfortable talking about those people being there or there (pointing at stages of emotional intelligence development) at first. But now I can see really clearly how they started there and have moved over to there in that time. And I know it's true. But even with K, you know? Ok, so she's gone, and thank God really! But she had gained lots of strengths and worked through lots of stuff. Emotional baggage stuff, really. And she had to leave really, didn't she, because she needs to leave that behind now. She's y'know dealt with it sort of.

J - Processed it.

M - Yeah, that's right. Processed it. Now she can move on in all senses. Well probably, anyway!

J - And it was a learning curve for me, 'cause she dumped it on me and all that.

The remaining extracts exemplify different participants' comments indicating that they are aware of some changes in their *own* behaviours which have been supported or facilitated:

Extract 6 D - I'm really pleased, because essentially what I've done is managed to come to terms with the thing that I can't be running round doing it all myself, and that others can do it really well and I can just facilitate it. And, what's more, they actually like it and feel more valued and etc etc!

C (facilitator) - Has that benefited the learners?

D - Yeah. I had a really nice example. Just this week, in fact. A (learner) had his person centred review in the new style, with everyone so much more involved. A was kinda quiet, but he was glancing up and down and it just seemed like he was really amazed and stunned with all the things people were saying, y'know, about what they like about him and all that. It was just so nice. His parents were fighting back the tears. Anyway, before that, y'know, I've seen him in M's class quite a bit. You know, I don't work with him directly, but he's seen me a bit and he's always just kinda ignored me really! Y'know, not a problem or anything, but I've tried speaking to him and that and he's not really wanted to engage. Anyway, after the review, he came to my office the next day! I couldn't believe it, you know, he's never even seemed to notice my existence before and suddenly he's totally taken the initiative and G (staff) turned up after him. Anyway, I said, 'Hi, A, nice to see you. What can I do for you?' He wanted to know if he could not have a one to one all the time. I thought he meant when he's out, y'know. So, I went on about traffic, safety and all that. But it turned out he was meaning in college, not out. When you think about it, he's probably spent all

of his life being followed round, y'know, because of the challenges and all that.

Anyway, the long and short of it is that he's now got it. We sat down and did a risk assessment and sorted out how to do it and, that's it!

C (facilitator) - Is it working?

D - Yes, it's great. But, that's really taught me that if I can let go and not feel like I need to be going round fixing it all myself, other people can get a look in and the student gets the space to do something fantastic like that. Y'know, initiating something and getting the outcome. Wish I knew all this all my life!

Extract 7: L-It was a mixture of lots of things coming together at once really. And it felt really overpowering, I was in confusion. My home circumstances changed, as you know. Really hard. I was struggling so much with everything, but trying not to show it to the students and my team. S (manager) was so great, helpful, well, you all were, and still are (grin). Anyway, it shook me up all over. But at that time I just suddenly saw N (learner with PCLD) in a different way. He just took off at that time: smiling, laughing, vocalising, but also kept reaching out to me and grabbing me! He really targeted me. He was probably saying, 'Get a hold of y'self, girl!'

The data from observations and the comments from individual staff themselves and from their colleagues, matched closely in **correlating observations of staff who demonstrated an ability to respond flexibly to learners, with the assessment by themselves and others in relation to developmental attributes or 'intelligences'**.

Two contrasting examples are provided below:

Example of link between Holistic and Emotional Intelligence competency and ability to respond flexibly to learners

Part A: Manager assessment of staff (B)

C (facilitator) - Which is your strongest lecturer in working with the learners?

J - **B** (staff)

C (facilitator) - Can you say why?

J - He's got great experience, hasn't he? Not just as a lecturer, but in the work before that. He's totally in tune with his students and relates to them in the different ways that suit them. He's calm and relaxed (well on the surface, anyway!) and just accepts stuff from them and works with it. He doesn't appear to have bad days, not in front of the learners anyway. You know, consistent. Good, really good, communication. Signs well and uses lots of aids, but also really good body language and listens and watches them brilliantly. He lives it, doesn't he? You know, the respect for students and the being totally there for them as needed. His paperwork lets him down, well has done in the past, but actually even that's pretty strong now. Few gaps, but what's there is good stuff.

Part B: Observation notes extracts, combined from OLTs carried out during research period (Refer to Appendix 4: Observation of Learning and Teaching Proforma).

OLT heading: How well does the session meet learner needs? Was planning effective and responsive to learner needs and preferences?

Evidence of student comments (verbal/non) in file linked to session plan - M (learner) said 'pizza', plan changed to shop then make pizza.

V (learner) bounced in his seat and made sound, B (staff) signed and spoke, prompted F (staff) to respond.

OLT heading: Promotes good working relationships that foster learning.

Positive atmosphere. Lots of smiles, staff responding to learners with eye contact and relaxed humour.

M (learner having difficult day, from other group) charged into the room ahead of staff. Staff and learners in the room carried on without worry. B (staff) quietly changed position to between M and J (learner) and spoke calmly to M, with affable tone.

Part C: Observation feedback extracts

B (staff) - The thing is, it's what S needs, so it means I've got to be there during that time and at the same time get C (staff) to support J (learner). If that means I can't do the other bits of work, well (shrug), when he's ready, we'll go for it.

B (staff) - I learned from working with R (learner) that all those things were really important to him - how you speak, body, voice and all that. It's about moulding yourself into that, isn't it? Changing into what he needs for that time until he's ready to, y'know, cope with different ways. They (another provider) keep trying to put their own goals and, well, values, I suppose, onto him with all that 'you must sit here, do this do that'. But that's meaningless to him, isn't it? They are very fussy around him, too. Not surprising he wants to bolt! He targets C because she's got this really high pitched voice, maybe because of his hearing. Plus she just *looks* nervous and tries to disguise it or whatever with this overbearing tone. If you watch him, you can tell.

It's obvious, but they're too wrapped up in all the stuff about controlling him to realise it.

Part D: Staff B's self assessment (extract)

To a certain extent, I'm not interested in all the stuff around. We're there to work with the students and, y'know, get the best out of the people. Doesn't matter if they're students or staff or whatever. The great thing about the students is, they're so responsive to it. Generalisation, I know. But, even when I think about it, I can't think of any of the students that haven't really moved on, you know? Developed. But you can't be all wrapped up in stuff going on and worrying about your own issues and things when you're with them. It just doesn't work. You've got to be well tuned in and on the ball. Otherwise you're not picking up on things. It's intensive stuff, but in a way it's also therapeutic for us, because we can't be thinking about anything else, or worrying about our worries.

These extracts show that staff B was working responsively during the observed sessions and that he was able manage his own behaviour to support the learners according to their individual needs. His analysis of the weaknesses of the other provider show that he is also able to consciously reflect not only on the learner's requirements, but also on his own responses to them and his assessment of the difficulties experienced by the learner with the other provider.

The second example: staff (A) has been selected as a contrast to the first. Other examples mirrored, or more commonly, fell between these two ends of the spectrum.

Example of link between Holistic and Emotional Intelligence competency and ability to respond flexibly to learners

Part A: Manager assessment of staff (A)

He's very negative about everything. He's raised a number of practical issues like storage and they have been listened to and addressed, but then J (another manager) was questioning him about why information wasn't available in the class, and he was saying about the storage issues and he didn't mention that they'd been resolved! He is also very inclined to go back to his team and draw them into the negativity, but the worst bit is some of the comments around students. We've been picking them up and logging them, talking to him about it; he's done training, same as everyone, plus one to one and shadow stuff. It's an uphill struggle! He just doesn't seem to take any responsibility for his words and actions, and he doesn't seem to be interested in their effects on everybody else.

Part B: Observation notes extracts combined from OLTs carried out during research period (Refer to Appendix 4: Observation of Learning and Teaching Proforma)

OLT heading: Promotes good working relationships that foster learning.

A talking to L (learner) quietly, giving L time to respond verbally.

A and N in and out of room throughout, N expressing non-verbally that she wanted to go out of the room, A persuading her to return. N pushed away activity repeatedly.

A talking to D (learner), S (learner) remained alongside but not engaged in interaction throughout the 20 minutes. A pushed things towards S with verbal prompts from time to time.

OLT heading: Was communication appropriate? Could other methods be used?

Verbal communication was calm and quiet, mostly allowing time for responses. No signing observed other than for 'toilet', no other forms of communication-objects, symbols used, other than some gestures. Initial assessments of four of the learners indicate use of signing.

A led each communication episode with PCLD learners. Learners who were able to express verbally were acknowledged appropriately during the round table evaluation.

Part C: Observation feedback extracts

A - I'm ok with the other group because I can see the point of what I'm doing. But some of these learners are not like that; I can find things for them to do, but they don't always respond much and they can't really do some of the things.

A - Yes, he (manager) is coming in, but it's not going to change what they can do. He's suggested I do the Intensive Interaction training, but I did the induction on it anyway.

Part D: Staff A's self assessment (extract)

A - The reason I wanted to work here was because of all the opportunities for them to do community work. But I'm more comfortable with the more able ones; that's what I'm used to.

In the second example, staff A is unable to control his behaviour and manage relationships with staff and learners, other than those with whom he feels 'comfortable'. He is aware that he is only working well with some learners, but expresses a disinclination to apply himself flexibly to the needs of the others.

Extracting the data from observations of sessions and from a range of interviews in this way, **I was able to identify some links between the performance of staff with learners, assessed against key theme criteria and their levels of personal development as described in relation to Emotional Intelligence** (refer to Figure 3.3). Using observations by the staff member him/herself, myself and managers, a process took place examining the extent to which the key themes of 'relationships and communication', 'tailored and flexible teaching' and 'learner control' were evident in the interactions between the staff member and each learner. During some of the individual and focus group sessions, participants considered the personal and social competencies in relation to the key themes. There were thought to be some strong connections. Below, S provides an example of her perceptions of the links between staff's ability to facilitate 'learner control' (ie learner-led learning) and their levels of self-awareness.

S - She's a pretty immature person, so I guess you could say that it was likely to be a problem!

C (facilitator) - Immature?

S - Well, you know, as it says here (points to EI Competencies) ... no self-awareness basically. He (learner) was telling her he was going to hurt her, but she wasn't listening and responding and kept bugging him, so he did.

C (facilitator) - So, she has no self-awareness?

S - Yes. She had her agenda and was sticking to it regardless. It wouldn't occur to her that J (learner) might have a perfectly, you know, perfect right to put across what he needs.

The focus discussions often exemplified the connection between emotional intelligence competency and ability to implement the key themes. The extract which follows is one example:

S (manager)- The contrast between R and A says it all. They both like Art and that's their thing. But H is able to subvert that in favour of what suits each learner, whereas A doesn't. If you look at your chart, H is consistently much more in tune against almost every area of the emotional intelligences and yet A, who comes from the same place (previous place of work) is almost off the scale in some ways! They're performing in totally different ways.

T (manager) - It's also the way that R handles things; she's not shy about saying if something's not right, but it comes from the right place, somehow. A has a reputation for whingeing, and the minute he opens his mouth he somehow lands himself in it.

Throughout the process of planning, actions and evaluations, I was aware that processes of connecting the key themes with the personal and social competencies could lead to simplification of highly complex, dynamic and individual behaviours. I was attempting to avoid the notion, suggested by one participant, that 'if we teach all the staff to be good at empathy, we'll be there!' I did initially use a simple tool of assessing participants' interactions with learners against the key themes and personal and social competencies, but this was to provide a simple starting point for discussion and identification of actions and as a tool for managers to think through aspects of personal and social competencies, rather than as research evidence. The tool involved managers assigning themselves, each other and members of their staff teams a measure of his/her degree of accomplishment out of four in each of the key theme areas and each of the emotional intelligence competencies (refer to examples in Figure 3.5 below).

The purpose of scoring was to enable participants to think in detail about each person and each competency; it was made clear that the scores themselves would be subjective and would not be used other than as a tool for thinking about how people develop in relation to the criteria under discussion. Taking the higher scorers, who were placed on the right-hand side of a continuum, managers were asked to identify those who had started at a different point on the continuum and to analyse some of the key events and actions which may have contributed to the development of their key theme and emotional intelligence related competencies. The purpose of the exercise was to engage managers in considering the development support needs of each staff member in relation to his/her holistic development. It is important to be

Figure 3.5: Key themes Competencies Scores

Staff	Relationships & Communication	Tailored Learning	Learner Control
Amm1	4	4	4
Atb5	2	2	1
Asas2	4	3	3
Bsac2	3	3	2
Bmc1	4	4	3

clear here that I was not suggesting in any way that this process should be applied mechanistically. Conversely, I was exploring with participants ways in which **the concept of emotional intelligence might help to improve the teaching and learning by improvement of the tailoring of support to learners and by offering a tool for staff and managers to gain a more comprehensive understanding of staff behaviour and staff development needs.**

It was a complex process since each of the staff participants are different individuals each with his/her own experiences and skills competencies, personality type, intellectual and emotional attainments, and they each have different relationships with other participants (including learners), managers and the researcher as well as their health and state on the day and the environment in which they were observed. Additionally, each of the learners observed with staff members had the same immense variability.

Staff	emotional self awareness	self assessment	self confidence	adaptability	emotional self control	initiative	achievement oriented	trustworthy	optimism
Amm1	4	4	3	4	4	4	4	4	3
Atb5	2	1	2	2	1	3	2	1	2
Asas2	3	3	3	3	3	3	3	2	2
Bsac2	3	3	2	2	3	2	2	4	2
Bmc1	4	4	4	4	3	4	4	4	4

Staff	empathy	service oriented	organisational awareness	inspirational leadership	developing others	change catalyst	conflict management	influence	teamwork & collaboration
Amm1	4	4	4	4	4	4	4	4	4
Atb5	1	2	1	1	2	1	1	2	2
Asas2	3	3	2	2	2	2	2	2	3
Bsac2	3	3	2	2	2	1	2	1	3
Bmc1	4	4	4	3	4	3	3	3	4

Figure 3.6: Key themes and Emotional Intelligence Competencies Scores

Placing the complexities of each person and other variables together, it was clear that the investigation was not aiming to achieve a normative outcome or a comparison of outcomes between participants. Instead, it was focussed on how each of the participants might benefit from a fuller understanding, based on identification of development opportunities relating not only to skills and competencies such as knowledge and experience of pedagogy, but the complementary development of emotional intelligence - in other words, the consideration of the development of the whole person, as well as the experience, skills and knowledge which may contribute to that development. This type of development is assumed to be an ongoing process, subject to each person's life challenges and changes and, therefore, the four year research period provides only a snap-shot, and the actions taken are only one part of the variables impacting on the individual's development. Given these complex variables, I have avoided aggregating the data, since a 'before-and-after' view of participants' responses to individual learners (implementation of the key themes) and/or emotional intelligence ranking would provide an overly simplistic evidence base and might encourage the formulaic approach which I was seeking to avoid. Instead, I have selected some case examples, which best illustrate the interconnections between the quality of response to learning support needs, the key themes and culture, staff (teaching) skills, knowledge and experience and their acquisition of emotional intelligence competencies. To avoid protracted case studies, I have summarised and combined the interview and observation data. This has enabled me to draw out some of the key points of analysis and to highlight the role of the learners in the development of staff competencies.

Example of the role of the learners in the holistic individual development of staff

Staff member **D** joined the organisation at age 24 as a learning support assistant with very little prior experience of working with learners with profound and complex learning difficulties. However, he had developed skills relevant to the key themes: he was able to communicate intuitively with learners and he understood and attempted to adapt to learner preferences. In relation to emotional intelligence he had a spiky profile, but in many circumstances he was able to demonstrate self-awareness and self-assessment and with learners (more so than staff) he was able to demonstrate adaptability, initiative and trustworthiness (as defined in the table of personal and social competencies, page 96). It should be noted that the early assessment of EI competencies were taken from the words used by **D** himself, my notes and the notes of managers, but these corresponded closely to the word clusters used in the personal and social competencies. An example from one of **D**'s early post observation discussions follows. **D** was explaining his reaction to his encounter with a very small and frail learner with profound disabilities whom he felt unable to work with at the time.

D - I sort of freeze up when it happens, you know. Can't cope. I can't cope with it, because it's too, y'know, close. Scary, y'know. Makes me feel like, screwed up inside. Then I've just got to back right off, right, and have someone take over. Just can't be done.

Whilst **D** was articulating self-awareness and self-assessment, he was also reflecting some issues in relation to emotional self-control and empathy; his emotions of sorrow were inhibiting him from understanding her and working with her responsively. During the period of the first eighteen months, **D**'s confidence grew and the training and experiences he acquired enabled him to be promoted. However, the enhanced role presented **D** with further challenges. He had struggled throughout with some of the organisational dynamics. He focussed tightly on his work with the learners and shunned dealing with issues relating to colleagues. In EI terms, the relationship management cluster of competencies presented a challenge for him. His narratives of critical incidents were indicative of this challenge:

D - She (manager) told me that I had to guide the other assistants, but I can't do that. I don't know any better than them. They're working one-on-one like; I can't say they're doing it wrong or something. I really lost it and yelled at her.

Over a period of just over two years, **D** engaged in a range of skills training, including intensive interaction, communication, IT, positioning, manual handling, personal care, shared concept of good practice. He was observed and feedback discussed, he had regular performance reviews, he participated in organisational planning sessions and meetings and he engaged in interviews for this research. In addition, notes from performance reviews and from interviews with managers indicate that managers identified with him different ways of broadening his experience and strengthening his skills and competencies.

V (manager) - We identified that he should work with a strong team leader to give him more confidence and to keep him in the right direction. He needed to understand that there should be a structure and learning goals and that's what we're about. He's good with the learners, but a bit maverick, not really appreciating that we're here to enable them to learn. We also thought a challenging group might get him understanding the need to plan!

As well as gaining experience with learners who communicate using challenging behaviours, D became accomplished at working with learners similar to the woman whom he had struggled with early on, as reflected in this extract from observation notes:

C (learner), serious face, frowning. D asked him if he was uncomfortable. Helped change position, good running commentary, tried different lighting, tried cushions under legs, changed music - smile from C. D comments and smiles back. D tries guitar, C smiles and mutters. D plays and looked for response, copies C's sounds ... resulted in roars of laughter from C.

Before D left the organisation, he participated in a research interview about critical incidents - an extract from his narrative follows. It features a learner (S) who had some verbal language, loved music and rhythms, exploring the environment and close contact. At the time, she would frequently communicate by clinging, scratching, removing her clothes, screaming, pulling people along forcefully:

D - Oh, it's got to be S! (learner) She's the one who really taught me stuff. Y'know about me (smile). She just knew exactly how I tick from the start and just had me floored in an instant, yeah! (chuckle). She's great. Y'know, these days I don't like to give up on it, y'know, get someone else to take over, that sort of thing, right? ... So she's just taken her clothes off for the third time and again C (female staff) has come to the rescue and I'm saying 'Come on, S, let's just ... blah, blah, y'know.' So anyway, I nod to C who goes with S into bathroom. Straight out with clothes on! No nonsense (chuckle). So then C makes a suggestion we do the chocolate mousse. S loves chocolate. God, you should've seen the kitchen! We're in there ten seconds and I'm covered in chocolate from head to foot! (laughs). She won't sit down or nothing, like that. C comes in - ten minutes later - S comes out totally composed carrying the bowl of chocolate mousse. C looks at me, I look at C! (shakes head, laughs) ...

D - Well, I guess before it would've been huge for me. I love S to bits, y'know, so to not like be able to do it would've finished me, y'know. But now, no. I'm just thinking, 'Good on you, S.' It's not about me, it's about her.

Seven months later, **D** was working for an overseas charity in a war devastated area. He wrote to the manager (as above) about his work and his reflections on his experiences in the organisation, in particular with regard to the organisational dimensions, the relationship management cluster, such as leading and guiding others, that he had found so challenging. He wrote in the letter, 'I just wanted to let you know, I see what you mean now.' The manager commented on this as follows:

V - It just goes to show that it's a process. The person is where they're at and you can't expect them to always be where you want them to be at. But that doesn't mean they won't get there, and it doesn't mean that your expectations are right either. Sometimes they need to leave to get to their next growth challenge. It's good if they arrive ready to hit the ground running, but it doesn't always work like that, does it? And we don't always get it right either.

This manager's reflections are useful in providing a rationale for an organisational culture which supports and promotes holistic individual development. She expressed the notion which underpins the EI concepts, ie that each person encountered is on a continuous pathway of learning and development. The interview and focus group work highlighted that **the promotion of this expectation of development not only prompted managers and staff to seek development opportunities, but also created a form of analysis which enabled them to become positive about individual potential, regarding both staff and learners.** The extract which follows illustrates the way in which this developmental focus can be used to turn perceptions and actions towards a positive driver:

Example of reflection on supporting individual development

M - He (staff member P) talks in the wrong way about the learners. He's talking about them as if they're not real people somehow, and some of the language he uses is swears (inappropriate). I know he's not been here long, but it's really not ok.

S - Can you give some examples ...?

Further discussion followed.

S – Ok, so we can do a number of things which will support him to change this.

M - Yes, but that will just change the surface behaviour.

S - It may take some time and if it doesn't work ultimately, we'll have to address that. But, don't forget he's come from (organisation). He's probably not even aware that it's not acceptable here. First we have to make him aware and support him through ...

These extracts echo the discussion earlier in this chapter in which I identified that the majority of participants perceived improvements against EI competencies in themselves and their staff. As this extract illustrates, there is a potential for coaching and mentoring discussions to become more positive when driven by consideration of holistic and person centred purpose. Comparison of earlier samples of coaching/mentoring/supervision discussions with later samples demonstrate this in many (but not all) cases. However, this is not intended to evidence a simple formula of interventions resulting in improvements. Each case is different, due to the interactions between each person's unique personality, experiences, organisational culture and his/her dynamic relationships and the data is limited to the period of study. In fact, two of the senior managers interviewed as part of the research were highly critical of EI leadership and management training, which they felt had encouraged their colleagues to apply formulaic and overly simplified solutions to highly complex organisational processes.

By this stage in the research, I had moved away from notions of a formula for improving quality. Instead, I was exploring use of an amended version of the person

centred model of learning and development used by learners with LD (refer to p79, Literature Review), which could be applied to staff. **In a similar way to Person Centred Planning used with learners, I was following a line of enquiry about the need to develop the whole member of staff, rather than to simply focus on skills.** For example, I looked at some of the skills training opportunities which were on offer within the case study institutions and examined the extent to which each might carry opportunities for self development *as well as* skills development and how this was, or could be, followed up through mentoring discussions, reflective practice discussions and observations. In some but not all cases, I was able to use the information to chart the route of holistic learning of a staff member. Two examples follow.

Most of the examples like the one below were relating to staff who had issues outside of work in addition to in work. Some of the issues noted were as follows: marital/relationship, family, health worries (eg impending operation), financial, depression and other mental health issues, in some cases relating to past (eg abuse), addiction to alcohol, concerns about ageing.

Therefore, **participants were in some cases engaging in a processing of current or past life issues, which were being amplified at work by the intensive, person-to-person close interactional nature of the work.** The interview data, in particular the data relating to critical incidents, showed that many stories featured ways in which a learner with PCLD had metaphorically held up a

mirror to the staff member, showing him/her their internalised persona 'warts and all'. Participant V said, 'What I have learned from him is to overcome my fear and anxieties by trying new experiences. Not letting the insecurity hold me back.'

The research data was indicating that there was a complex set of variables and outcomes in each stage; it could not be synthesised simplistically into a set of universal solutions. Instead, the evaluations (during interviews) from participants were indicating that the value of the actions taken was the opportunity to engage and learn from the process in a way which was tailored to each circumstance and interaction. The broad consensus of the key themes, the understanding of possible teaching strategies, the training and mentoring, conducive organisational culture and practice, the balancing of external constraints and barriers, were all important and inter-connected. But, when the focus was turned to the direct experiences of the learners within the organisation, it was their experience of the minute-to-minute interactions with staff and others which formed their 'in the now' gauging of the quality of the experience. It seemed that **staff need to have at their disposal not only a battery of flexible strategies to support development, but a well-developed ability to respond intuitively and in such a way that the interactions can form part of an engaging, mutually developmental process.** The achievement of this will be a never-ending process, since each new interaction will be different. The acquiring of holistic self-development and EI 'maturity', therefore, cannot be achieved by a training course alone, neither can it be achieved through a preset process; it is instead **a continuous form of learning derived from the**

Figure 3.7: First example of opportunities for self development - Staff B

Identification	Development opportunity	Impact / further action
Observations, mentoring, feedback from staff identifying issues with B's practice and application of ethos		
<p>Discussion between managers re issues and strategy for support and supervision. The issues identified were:</p> <ol style="list-style-type: none"> 1. Self awareness, lack of accurate self-assessment 2. Compliance with requirements 3. Understanding of ethos & how it is expected to be manifested 4. Self management – trustworthiness & emotional self-control relating to taking responsibility, not blaming junior colleagues 5. Understanding & implementation of concept of teamwork & collaboration 6. Integrity in organisational awareness 7. Conflict management & accepting views of others 	<p>B participated in discussions with manager in relation to identified concrete examples of some of the issues.</p> <p>Observation feedback was provided as a springboard for further discussion.</p> <p>Supervised opportunities provided for building confidence through sharing area of expertise with colleagues.</p> <p>Shadow teaching & reflective evaluations were introduced.</p> <p>Training in reciprocal approaches was revisited.</p>	<p>Compliance with requirements improved to some extent.</p> <p>Self awareness started to emerge in the form of increase in defensive-aggressive behaviours.</p> <p>Opportunities for confidence building were unsuccessful. Colleagues were supportive, but it served to highlight that the professed area of expertise was less developed than she had thought or portrayed.</p> <p>Improvements in relationships with learners occurred. Some isolated improvements with relationships with some members of team.</p> <p>B left organisation to engage in a more senior position elsewhere.</p>
<p>B was not available for follow-up. Managers' views differed in their conclusions:</p> <p>M - We may have coached her into the language she needed to get a promotion elsewhere, but has she developed sufficiently to be able to sustain it?</p> <p>D - Some progress was made; she improved practice and compliance and some relationships.</p> <p>S - The reason that her lack of appropriate professional behaviour emerged was due to her becoming more self-aware. She was starting to realise that she wasn't better than everyone else! She didn't even recognise when people like SS were trying to help her. But in a sense we probably accelerated her self-awareness, because we kind of took her at her word, and when she said she could lead things we said, 'Great, here we are.' Then she was put into the leadership-type role, like leading the training with peers and she found out that she was basically crap at it.</p> <p>D - We never managed to build the trust with her to support her enough to stay when she exposed herself.</p> <p>S - Yeah. She wasn't letting anyone in, even when we tried giving her J as a peer support instead of doing it in a line management way.</p>		

Figure 3.8: Second example of opportunities for self development - Staff M, who had been promoted

Identification	Development opportunity	Impact / further action
<p>Discussion between M and line manager and M's senior manager</p> <p>Observations of M in role eg chairing meeting/training</p> <p>Previous Performance Review data</p> <p>Interview data</p>		
<p>M identified the following:</p> <ul style="list-style-type: none"> - get more confident and practised - have courage to tackle things - be more assertive - understand some less familiar aspects of role - change level, get myself from there to there <p>Managers identified the following:</p> <ul style="list-style-type: none"> - improve knowledge and skills in new role - self-confidence and initiative in personal competencies - expand organisational awareness - key areas are relationship management cluster ie inspirational leadership, developing others, change, conflict, influence 	<p>Induction and skills training (internal)</p> <p>Management away days (familiarisation and practice at participation in 'safe' environment)</p> <p>Leadership and management training (external)</p> <p>Peer review and shadowing</p> <p>Mentoring (line manager and senior manager)</p> <p>Observations and feedback (eg leading training)</p> <p>Feedback on monitoring activities</p>	<p>Improved skills level and familiarity with role, improved self-assessment and confidence</p> <p>Strong improvement in assertiveness and presentational skills</p> <p>Improved in all aspects of relationship management cluster</p>
<p>Both M and the managers considered this process to be highly successful. Managers voiced that they had been confident that M would successfully gain skills and knowledge, but there had been less confidence that M would develop the awareness required for improved presentation, assertiveness and management of change and conflict. M identified that the mix of training and coaching along with a measure of 'thrown in the deep end' was good; in particular M emphasised that the continuous reassurance from managers that, 'All my awful faux pas were accepted as part of the process by the management team,' had been critical in enabling M to 'take a step off the cliff, knowing that someone was there at the bottom to catch me!'</p>		

current state of development and other factors experienced by each individual participant.

The results and discussion in this chapter have centred around a complex layering of dynamically interacting factors in the creation of quality experiences for each learner. In taking this focus, I have been influenced by my emic practitioner-manager experiences and my ontology pertaining to the notion of what learners and staff want and need. I have largely ignored, for example, the debate about what type of learner outcomes are valid. I have taken the observations and described experiences of learners and generalised these into key themes, which represent their *experience* of quality. However, I have not explored the relationship between this experiential notion of quality and the concept of quality relating to more tangible learning outcomes, such as qualifications and progression routes.

As the research progressed, **it became apparent that this humanistic style conceptual filter was not going to be consistent with a simple manual of solutions; one size would not fit all. Instead a more complex paradigm emerged, layering organisational culture and management alongside individual interactions, decisions and developments.** The key themes and Emotional Intelligence competencies provided a useful point of reference and means of analysis to enable managers to be positive about staff potential, as seen as a process. Managers needed to be able to differentiate their style to suit different staff and circumstances, just as with staff and learners. Coaching was often less well used as a technique than other strategies, in part due to managers' own difficulties with

exploring emotional intelligence issues. In addition, an emphasis on following through on generic and skills training in order to maximise the self-development opportunities for the individual member of staff is a recurring theme in the analysis of the gaps in staff development as described by participants.

One of the critical challenges in reflecting on the complex range of data gathered through the study, was how to create coherence between the

dimensions and layers without losing their richness. Out of general interest, I had been reading about sub-atomic physics. I could perceive some connections with the emerging organisational paradigm, in the sense that the complex interactions seemed to be non-linear in their development and yet they are a part of a whole which is affected by these micro changes. It was my readings about physics and theories of 'reality' which led me to work by physicist David Bohm and others on 'creative dialogue' (refer to Literature Review). It resonated strongly with some of the actions and, as I trawled back over the data, I was able to locate key discussions which exemplified aspects of creative dialogue in which the unfettered sharing of understandings and assumptions had provided holistic development opportunities (refer to Conclusions).

In summary, three aspects are most noteworthy in relation to the actions taken in exploring the benefits of developing staff in relation to their personal social competencies: 1) There appear to be some links between the staff's competency in achieving the key themes in practice and his/her level of development as defined by the EI competencies. However, the actions did not always result in perceived

improvement against the personal and social competencies within the time-frame of the research; 2) The learners with learning difficulties/disabilities themselves were frequently an important catalyst in the development of staff; 3) Staff involved in mentoring, supporting and appraising others found the use of personal and social competencies and the use of creative dialogue beneficial. However, there are some caveats to the findings. It was important to avoid a simplistic application of the key themes and EI strategies. Instead, it may be helpful to visualise the paradigm multi-dimensionally. In this visual representation, each learner is considered holistically, not just in terms of his/her functional learning goals, but including aspirations, needs, emotions, preferred support, communication and learning style and so on. It is recognised that these aspects will change with time, from minute to minute as well as in the broader dimension of time. Imagine all the learners in the middle of a web-ball like the one in the diagram on page 275. Each time something changes within or around a learner, it will metaphorically tug on the connections with the other learners or the space around them; thus a change in one part affects the whole.

Now imagine the staff inserted into the web-ball and forming connections with all the learners and with all the other staff. Just as changes in and around the learners affects the whole, so the same applies to the staff.

Imagine the spaces between the people and connections as the organisational culture and the intersecting whole as the roots of the planning, strategy, organisational processes. If a person or 'space' changes creating a pull in the web-ball in one direction and at the same time changes occur in an opposing direction

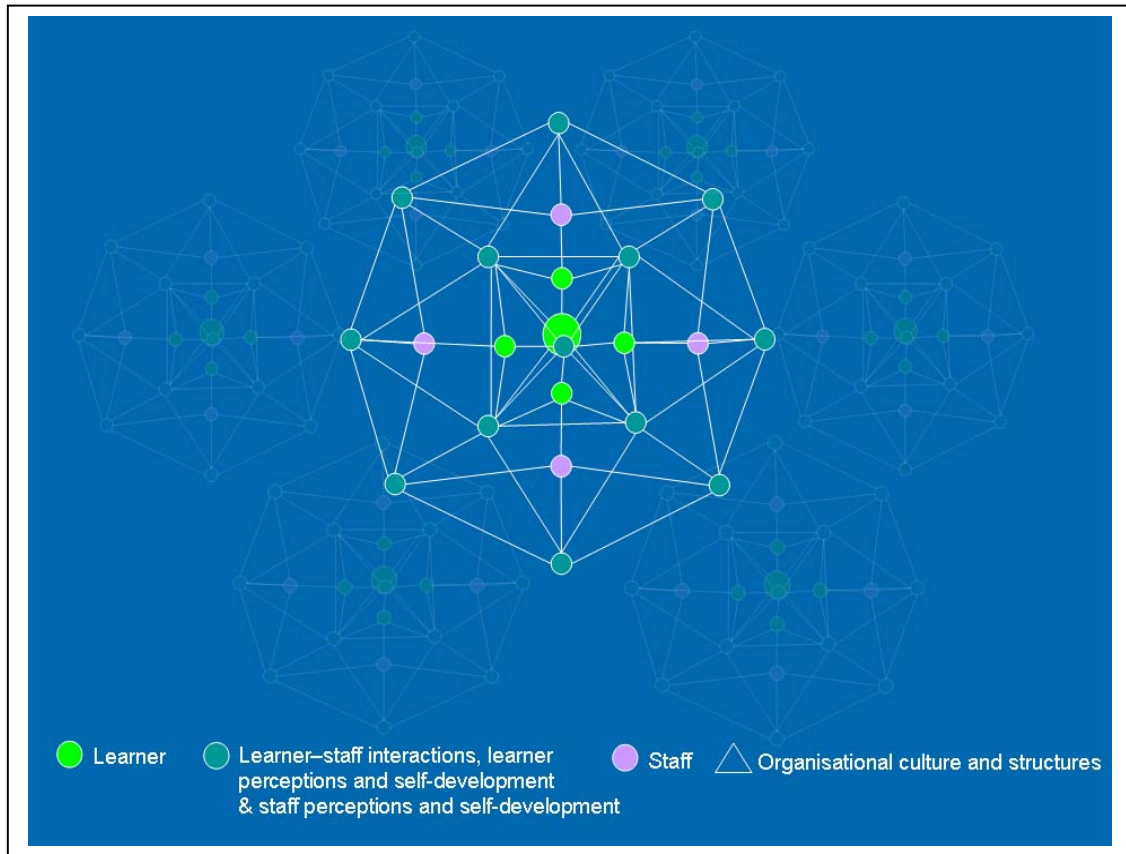


Figure 3.9: Organisational web-ball

elsewhere in the web-ball, there will be ‘natural’ tension created. The visual model enables us to see how this tension is inevitable but also, importantly, that it affects the whole. **Working through these tensions, or challenges, provides self-development opportunities for the individuals and in turn affects and holds the potential to strengthen the whole.** Therefore, the entire web-ball must respond in some way and it may not retain its same shape and dimensions. In addition, there may be points of synchronicity, in which change is mirrored and reflected in different parts of the organisational web-ball. These are those ‘magic’ moments when

everything seems to come together, which were recounted in many of the critical incidents interviews.

Finally, there are the external variables, such as the surrounding organisations, the funding and qualification issues described by participants. These can be visualised as shadow web-balls which cut across the web-ball, challenging it to shape around them or absorb them.

The implications of this conceptualisation of integrated development are explored further in the chapter which follows: Conclusions.

Conclusions

Complexity is a turn away from linearization, from hierarchic levels, to something holographic (Boje, 2008:26).

At the outset of this study, I did not have a very clear idea about what I would say in this chapter, but I anticipated that I might be identifying SMART (specific, measurable, achievable, realistic, timely) quality indicators, or something similar, and recommending ways of achieving them in order to improve quality of provision for learners with profound and complex learning difficulties/disabilities (PCLD). It became apparent that whilst such prescribed guidance has its uses for individuals and organisations at certain stages of their development, the complex and dynamic nature of provision required deeper, reflective and organic developmental drivers.

Emerging Paradigm

As a practitioner-manager, I am accustomed to working to the normative, criteria driven, formulaic demands of funding bodies, auditors and other external bodies and some of the similarly driven management strategies are familiar to me. Indeed, aspects of these have been used in the study. But as I delved into examination of the complexities of organisations, I found that the linear conceptualisations which these approaches reflect were insufficient to capture the intricate and varied aspects of the organisational experience. Not only were these conceptualisations insufficient, they could also be limiting, as noted in relation to the role of the learner in shaping and influencing organisations.

As I explored concurrently the organisational, collective dimensions and the individual and interpersonal dimensions of the organisational contexts within which we provide for learners with PCLD, it became apparent that a multi-dimensional, holographic, paradigm was needed.

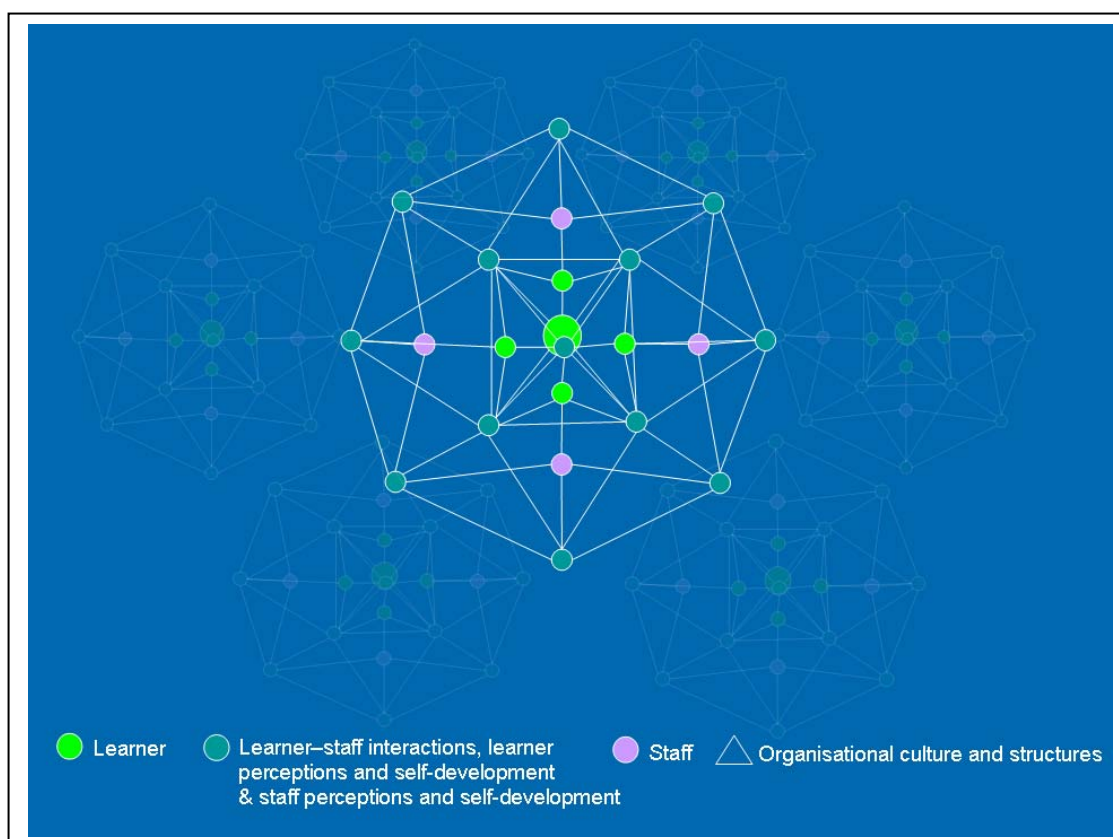


Figure C.1: Organisational web-ball

The web-ball is described more fully in the previous chapter, but requires revisiting here to set into context the discussion which follows. This web-ball is a visual model which enables us to see how organisational tension is inevitable but also, importantly, that tensions can affect the whole. Working through these tensions, or challenges, provides self-development opportunities for the individuals within the organisation (both learners and staff) and in turn affects and holds the potential to

strengthen the whole. Therefore, the entire web-ball must respond in some way and it may not retain its same shape and dimensions. This is a reflection of the dynamic, transitory nature of organisations.

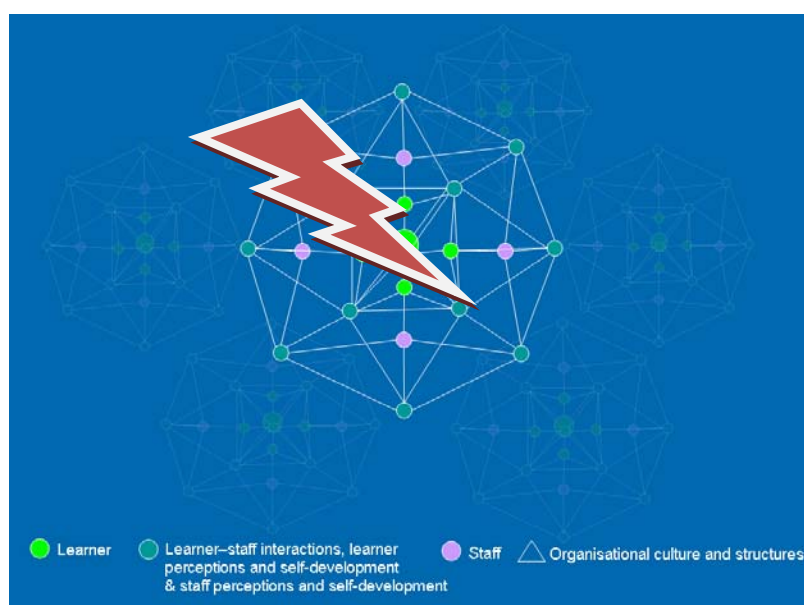
I think of the web-ball as a geodesic dome toy (comprising an interlocking grid of hexagons and pentagons) which can be pushed and pulled into different arrangements. The web-ball provides a visual representation of a non-linear construct of organisations. This does not negate the relevance of other approaches which may focus on an aspect or set of aspects of the organisation. Instead, it allows for a holistic picture which holds the potential to contain these multiple aspects within its layers. This allows us to virtually (in our mind) walk inside to explore the organisation and each aspect of it from inside as well as from outside, so releasing us from the confines of two-dimensional thinking.

In the study, there was a high level of commonality in identifying the key themes as framework components of quality and yet the full realisation of this in practice was limited. Managers often expressed frustration at the many improvement interventions which had not succeeded. But these interventions were usually focussed on functional and systems changes, such as one-day skills training, increased staffing ratios, increased planning. Of course, all of these interventions *do* hold the potential to contribute to the improvement of quality, but they need to be supported by a deeper level set of changes. The frustrations of managers arose from linear thinking that led them to believe that identifying a problem and carrying out a fix would delete the problem. This type of reflection is ingrained in western society; it pervades our

approach to science, education and health (refer to Chapter 1, Section 4). Three hundred years ago Descartes introduced the scientific method which operated from the premise that measurable aspects of our world could be reduced to their fundamental building blocks. 'Scientific discoveries progressively described a beautifully ordered world, which seemed to operate like a vast intricate machine' (Currivan, 2005: xii). The scientific method continues to have benefits, but when we try to apply linear systems thinking to human relationships and interactions it provides an incomplete picture. One of the difficulties associated with other conceptualisations of consciousness is that they appear counter-intuitive. Our ability as humans to abstract and objectify, 'bringing forth an inner world of concepts, objects and images of ourselves' (Capra, 1996:286) leads us to separate ourselves and develop fragmented ontology. However, the discoveries of the behaviour of energy and matter at microscopic quantum levels have generated the development of technology and a questioning of unexplained anomalies and irreconciled theories (refer to Chapter 1).

The iterative process of research, action and reflection has had a dramatic impact on my own behaviour and practice over the years of this study. It is an ongoing process. It is apparent from the study that the other participants too are at different points of their individual and collective processes of development. In the latter part of this chapter, I draw on a number of factors which were important to take into account in these processes and strategies.

These strategies are designed to train us to make greater use of our right-brain as well as our left-brain capacities. Using the web-ball diagram in addition to words, for instance, engages our right hemisphere. After a long period of attempting to reconcile the study data with conceptual models and strategies, it was this use of picture and imagination which served to unlock my thinking. The left hemisphere of our brain manages speech and the rational, analytical and logical functions and the right hemisphere reasons holistically and recognises patterns, emotions and nonverbal expressions. If managers are to work through the left-brain demands of external bodies and simultaneously engage in the deeper-level, holistic improvements which impact on the learners' experience of quality, there is a need to develop and *connect* this work. Managers in the study frequently voiced feelings of overload, which not only related to the faster pace of life, onslaught of top-down national initiatives and perceptions of being measured simultaneously in every conceivable way, but also



One participant described the impact of a national initiative as 'like a bolt of lightning'.

Figure C.2: External demands

managers were often voicing concerns that they were being pulled away from the 'real' quality issues in order to meet preset external criteria.

It is not my purpose here to explore the intentions or impact of external initiatives which generate these difficulties, other than to comment that they seem contrary to the holographic thinking referred to above. In reviewing participants' dialogue, it is clear that the separation of the externally and internally derived issues created significant tensions. However, some participants related incidents in which they were able to influence, adapt or in some way absorb or connect external demands into the culture or fabric of the organisation. This reflected their ability to defragment and absorb or reconfigure externally derived influences into the organisation.

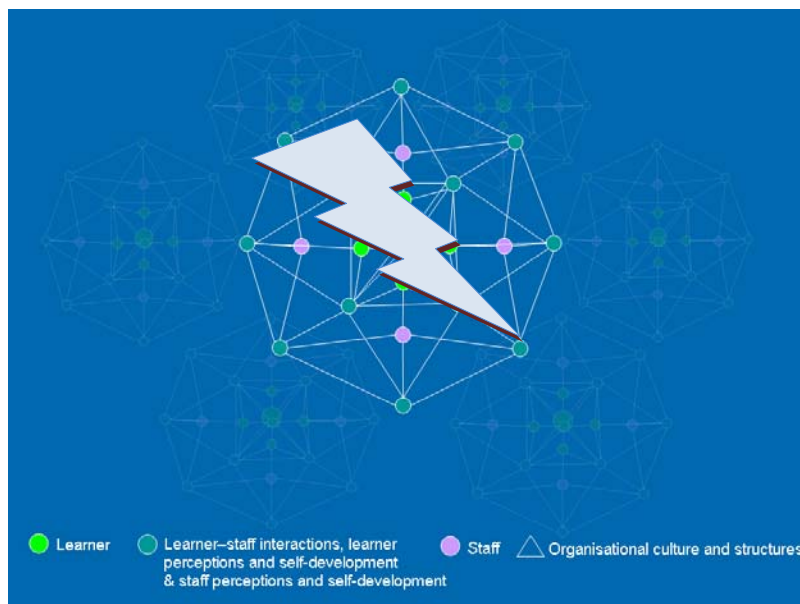


Figure C.3: Defragmentation of external initiatives

Whilst the focus in this study is development within the working and learning context, there may also be scope for this type of thinking to be facilitated through pre and post

qualification training. In the United States of America, some medical schools have introduced use of narrative and empathy to improve the effectiveness of physicians. For example, at the Yale School of Medicine the curriculum includes study of an art component, 'because students who study paintings excel at noticing subtle details about a patient's condition' (Pink, 2008:52). The benefits of facilitating development of holistic thinking, combining left and right brain functions and in particular appreciating the right brain attributes which have been maligned by our mechanistic thinking not only hold potential for changing organisational and management practice, but also for staff to co-create high quality experiences with learners.

I did not find a set of left-brain generated, SMART quality indicators which would provide 'the answer', but I did find that there were a number of factors which were important to take into account in these processes. These factors do not discount the normative criteria used by regulators and inspectors, but recognise that these may only touch the surface. The experience of quality for learners with PCLD is bound with a much deeper complex interplay of dynamic relationships which can only be partially captured by generalised prescription. In considering holistic learning (ie skills and knowledge combined with emotional intelligence), whether for learners with PCLD or for staff, we are delving into connected deep-rooted development which aligns with language and behaviour. Staff may be trained to carry out an action in a certain way, but this study highlights that the *application* of the action will vary significantly. The learners' experiences of the quality of provision (often recorded through gesture and facial expression) centred on sensitivity to the learner's individual preferences which required staff to develop an eclectic assortment of skills

and strategies combined with emotional intelligence; a combination I termed 'holistic maturity'. If staff are to be fully responsive to each learner, their own internal development needs must also be addressed. They must 'live and breathe' the principles so that, given the infinite variables of circumstance and personal state of both staff and learner, their responses will be holistically mature. I liken this to my experiences of martial arts: detailed training and development occurs over a period of time so that in the precise moment when the move is required, it flows without thinking.

Learners as Partners

The web-ball prompts us to extend our thinking about the role of learners in organisational development. Organisations often attempt to adopt standard techniques for evidencing learner involvement, such as learner councils and learner surveys, but these have limitations for learners with PCLD (and others) due to the abstract nature of reflective evaluation and the issues of interpersonal communication; therefore, additional capturing of learner responses *in the moment* is important. This does not necessarily entail constant recording, but appropriate use of intermittent observing, videoing and noting of responses can be used to heighten reflection and evaluation and to provide evidence of changes and developments.

In the previous chapter, I allude to the often untapped potential for organisational development, arising from processes such as person centred planning which focus on each learner's admirable characteristics as well as his/her needs and aspirations. Here again, stepping outside of dominant thinking into a holistic-holographic

perspective allows us to see the potential for learners to become partners in organisational development. Holographic technology demonstrates that the whole may be seen differently than the commonly applied mechanistic view in which the whole is broken into its separate, component parts. Instead, a hologram when cut into pieces reveals its whole in miniature replica within each piece.

By applying this holographic knowledge to our thinking about the quality of provision, we are able to perceive of each learner's attributes, needs and aspirations as an intrinsic part of the culture or fabric of the whole, rather than as a separate entity which requires a response. This subtle but significant difference in thinking carries the potential for greater holistic maturity, since it reveals the merging of reciprocal experiences into mutually derived and shared developments. Expressed simplistically, instead of thinking of a learner as a set of needs and learning goals to be 'solved' by the organisation, the learner becomes one of the key ingredients generating the challenges for growth of the organisation: a developmental partner.

The implications of this first part of the conclusions raises the question: How is it possible for leaders and managers within organisations for learners with PCLD to effect this type of change in thinking and approach? It is clearly not possible to implement this change in thinking as a short-term fix. Therefore, in the latter half of this chapter, I draw on some of the factors and strategies which may be useful in moving towards the development of holistically mature people and organisations.

Key Themes

Some key themes emerged from the research: (1) relationships and communication; (2) tailor made learning (including relevant learning and progress, structure and flexibility); (3) learner control (learner-led activity, motivation and choice). Echoing the literature, participants' comments and observations data demonstrated the importance of these strands in consideration of quality in this context. However, their interpretation and implementation by participants were not always consistent. The development of a shared concept of good practice (refer to Chapter 1) helped participants in achieving greater clarity and shared understanding of what the key themes mean in practice when applied by different people, with different people, within their organisation and, for those considering collaboration, within different contexts. This 'shared concept' manifested in shared language, in particular in developing organisational stories and dialogues which were indicators of the process they engaged in for making sense of the complexities of the organisational experience. This strategy also enabled those managers who participated to identify and raise awareness of expectations and become aware of perceived barriers.

It became apparent that generating a living and breathing culture featuring shared vision and shared understanding which develops within every aspect of the whole organisation, required the integration of multiple processes (such as: dialogue, training, mentoring, reflection), supported by operational guidance which was predominantly consistent with the shared understandings. This does not imply that everyone within the organisation thinks and acts in the same way. The study showed that individual experiences and developmental maturity impact on interpretation and

implementation, but that these variations can be seen as helpful in feeding the development of the whole, by creating challenges and tensions which provide opportunities for learning and growth in seeking solutions. It was clear that a day's training from an external facilitator can contribute, but it is insufficient as a stand alone strategy. Individual and organisational development is non-linear, complex and indefinite and requires a flexible mix of approaches to improvement.

With regards to the key theme of relationships and communication, reciprocal and interactional approaches, such as 'intensive interaction' (refer to Chapter 2), are consistent with this non-linear conceptualisation of organisations. Staff can gain skills in observation, mirroring, identification of idiosyncratic communications, and so on. In addition, the nature of interactional approaches allows opportunities for the type of individual and collective holistic self development discussed in Chapter 1, Section 4 and Chapter 3. This is not to claim that more prescriptive approaches are redundant. It depends on many complex variables which are difficult to capture outside of the actual circumstances, because even with the same people involved they are constantly changing. Therefore, an eclectic assortment of approaches to the key theme of building relationships and developing communication is preferable.

The study showed that there were significant differences in the ways in which staff were able to apply learned skills. Some were more successful than others in tailoring the approach and its application to the specific learner and circumstance. Sometimes this variability was also evident when the same member of staff worked with different learners or in different circumstances. One of the many factors affecting staff was

their level of confidence in each circumstance. When confidence was strong, the staff often became more focussed on the learner's requirements rather than defaulting to something which felt comfortable for him/herself. Training and mentoring as part of a continuous process was often reported by participants as contributing to raising confidence. However, it is clear that self-awareness is also critical since staff carrying out work confidently but without self-awareness could result in insensitivity towards learners and others. Therefore, a training course in communication techniques is often beneficial, but it is insufficient if participants lack elements of emotional intelligence, such as self awareness, which require engagement through experience and guidance.

In addition to the tailoring of communications, the study revealed issues relating to structures and systems which require attention in order to provide an environment in which quality provision may be found. Participants identified external and internal barriers to providing personalised learning, some of which are highlighted in the preceding chapter. In addition to achieving clarity of shared understanding of good practice, continuous informing, creative problem-solving dialogue and reflection are needed. Confusion and frustration were reported when there were situations in which people were asked to do something but were subject to perceived barriers, such as staffing levels. Lack of clarity of expectations and inconsistency of interpretation of expectations was apparent not only within the organisational dimension, but also within some individuals themselves, who had not yet considered their own drivers, values and behaviours. However, most of the participants voiced a commitment to the learners, although the nature of the commitment varied. In some of the

organisations the manifestations of tailored learning were evident, such as individualised planning, celebration of learner work, respectful tone of voice and manner towards learners. Whilst observations still revealed variations in the individual experiences of learners within these organisations, it seemed that the processes required to establish these manifestations were in themselves helpful in providing a basis for holistic development.

On reflection, the key theme of learner control (learner-led activity, motivation and choice) heralded some of the actions and thinking which led to the conceptualisation of the organisation as a unified web-ball (refer to Chapter 3). The way in which I expressed the heading of this key theme in itself demonstrates how my thinking has changed. To a degree, the words 'learner-led activity, motivation and choice' imply functional elements which might be dissected to form quality indicators. They remain, nonetheless, important elements, but the missing dimension is the conceptualisation of partnership with learners. Those words in the heading of the key theme focus on the individual learner taken as a separate part, rather than the individual as an element of the whole who both receives *and contributes*. The study demonstrated that many participants could talk about learner 'voice', 'feedback', 'rights', 'choice' and so on. However, this was not always mirrored in the observations of practice, and when it featured practice, it was frequently applied in the form of isolated processes, such as choosing between tea and coffee and a meeting of a learner council, rather than constantly interwoven into behaviours as discussed in the subsection above (page 284).

Emotional Intelligence

The research examined links between implementation of the key themes and emotional intelligence and showed that interpretation of the key themes by individuals and organisations relies on maturity (state of development of skills, knowledge and emotional intelligence). Therefore, the quality assurance interventions in various forms were most effective when the individual or organisation was ready ie at a stage of development at which the intervention could make sense to them. In addition, individuals within an organisation are at different stages of self development, and self development is not a predictable, normative, linear or step-by-step process. For example, an individual may alter temporarily due to a particular incident or experience, such as one which compromises his/her confidence. Therefore, there is a lack of uniformity and a clear requirement to avoid applying one-size, formulaic solutions. This correlation was important, since it led to an increased focus on a mix of learning and support opportunities which also provided scope for increasing emotional intelligence.

Training and development of skills which would enable individuals to gain knowledge and experience were helpful, but required fertile ground to flourish. Again, this fertile ground was relevant both to individuals and to organisations. The research also highlighted the critical impact of the interactions between individuals as well as the interaction between individuals and the other elements within and between organisations. In particular, the fundamental role of individual learners in individual staff self development was evidenced. Work with learners with PCLD was often characterised by participants as extended time working closely together, struggling to

grasp each other's communications, confronted by raw forms of expression, such as challenging behaviour. Staff participants often had not consciously recognised the full impact of learners on their development, but their accounts of critical incidents frequently divulged ways in which a learner had triggered a realisation or stimulated greater self awareness in the member of staff. There was also evidence that individual learners had created a change in organisational culture through behaviour which cast attention on historically driven norms, such as locking doors, noise levels, tone of voice of staff. There were also some similar examples of ways in which learners had changed classroom practice and ritual. Systemic, formal influence by learners, such as through the impact of person centred planning, was not so evident. But the potential for this to be developed became apparent as these aspects of learner influence emerged from the data. This was an exciting discovery; instead of the organisation providing and the learner giving feedback through comments (verbal or non verbal), I was seeing ways in which the learners were actually helping to *create* experiences within the organisation and the largely untapped potential for this co-creativity to be further embedded to enable the organisation to increase its responsiveness.

The role of managers in contributing to the shaping of the organisation to facilitate conditions for growth and development of learners, staff and themselves was highlighted in the research. Once again the combination of skills and knowledge and emotional intelligence, which I term 'holistic maturity', featured as influences on management behaviour. The study demonstrated that within the participant organisations, functional actions (such as identifying shared mission and vision,

forward planning, training) were helpful, but creative-developmental actions and conditions taking account of emotional intelligence (such as through creative dialogues and reflection, openness to self learning and change) increased the levels of responsiveness to learners within the organisations. This is not to claim that this increase was throughout, or that it can be applied as a simple formula for improvement. However, it does indicate that engagement in the creative and interactive process of defining, implementing and refining a shared concept of good practice, as opposed to the imposition of external preset criteria, supported the development both of individuals and the organisation. One of the difficulties I encountered though, was the lack of consistent response even within an organisation, much less between organisations. Whilst I could extract some generalisations from the results, I was continuously confronted with the realisation that the generalisations created over-simplification by implying norms which only applied to some aspects of the phenomenon at best. This difficulty, along with a determination to ensure that the individual learner was at the centre, led me to turn to consideration of the holistic maturity of staff in responding to learners.

The study showed a connection between assessments of individual staff responding to learners (encapsulated in the key themes) and their perceived levels of emotional intelligence (described as emotional intelligence competencies). Whilst this is an important realisation, I am not suggesting that training or even coaching in achieving the competencies will answer the difficulties described above. As with other functional approaches, at the right time, when the person is in a state of readiness, taking account of the need to mould and tailor the opportunities to suit the individual

and the set of circumstances, then it may be helpful as one of the many strategies available. I am re-emphasising these caveats, because in the face of so much complexity it is tempting to apply a formula. Many of the managers in the study expressed frustration at their perceived lack of success after taking forward so many improvement initiatives. They were always able to identify someone who had not assimilated it. But this frustration is part of their development too! It can provide stimulus for development. When I discussed these reflections with a group of managers, they cited two individuals who had been dismissed from their organisation, but whom they considered to have taken through every possible means for supporting and nurturing their development. When I questioned the managers further, however, they realised that each of those experiences had added something positive to the development of themselves and their organisation. Experiences do not necessarily have to be happy and comfortable to have a positive impact on development, but searching for positive aspects and appreciating their impact enabled this group of managers to develop their emotional intelligence by standing back from the ego position of 'ours is the only way' to view the broader landscape. This also reminded me of my experience as a researcher-practitioner-manager through this study and in particular the emergence of my understanding of the critical role of dispassionate questioning and creative dialogue in creating space for individual growth.

Tools and Strategies

Throughout the recording of this study, I have highlighted my assumptions, predispositions and influence. As I examined each layer of data and reflections with

the participants, I found that closer focus revealed depth and unpredictability below the surface of organisational management tools, such as mission statements and action plans. As I attempted to work through my feelings of panic that it was all too complicated to capture, I realised how necessary these tools and strategies may be in providing us with pegs to grasp when we are living inside it. These tools provided me with platforms from which I could form alternative views. However, the study forced me to witness the limitations of these tools and the importance of resisting the temptation to use them as means of ticking the boxes of quality improvements, without consideration of the deeper development required to ensure that each learner's experience is positively affected.

The examples in Chapter 3 highlight the important role some managers play in facilitating conditions for holistic growth and development of learners and staff. It was clear from the research that the great differential in the variables affecting quality between the organisations involved made comparison unhelpful. The strategies that had worked successfully in one organisation could not be applied simplistically in another, because the often subtle variations made this futile. The actions taken in which participants from different organisations shared practice and reflections were most successful when the organisation or individual was able to morph the ideas, advice or strategies to become their own unique version. On surface level, an organisation might adopt a recommended structure or strategy, but at a deeper level this only impacted on the quality of experience of the learners when it became so integrated within the culture or fabric of the organisation that it could be applied

sufficiently flexibly to the unpredictable, dynamic behaviour and interactions of people.

At this point in the construction of the reflections on the study, I had identified the following, with caveats about the need to avoid present strategies:

1. Focus areas -

- key themes
- skills and knowledge (including teaching approaches linked to the key themes)
- emotional intelligence

2. A pick and mix toolkit, including -

- strategies (such as person centred planning, identifying a shared concept of good practice)
- training, sharing, coaching
- dialogue, reflection and creative debate

It is the use of creative debate which offers the potential for non-prescriptive learning and development in which an organisational culture of 'collective consciousness' may form. The challenge still remains for each organisation's managers to identify ways in which to consolidate individual holistic learning into organisational management and vice versa synergistically. The study showed that functional skills and structures alone were insufficient to effect change. By conceiving of the challenge in terms of the integration of the dimensions of strategies, skills and development with organisational culture and individual holistic maturity, there is potential to ensure that

strong drivers to assimilation and growth related to emotional competencies (such as awareness, empathy, adaptability, self-confidence) are not ignored.

By developing this holistic paradigm, in which the organisation is an entity of which each learner and staff member is an element, I aim to throw a spotlight on organisational development and management in such a way as to engender creative debate within organisations that centres on the quality of experience of each person with profound and complex learning difficulties/disabilities as a partner for individual and organisational development. The conceptualisation of the organisation as a unified web-ball is helpful in moving away from the pitfalls of mechanistic interventions. This fundamental shift enabled me to visualise the complex, interrelated, dynamic and chaotic elements which emerged from the research into a whole which supported rather than suppressed its fluidity. It also gave welcome prominence to the potential to activate and recognise partnership with learners. The framework of relevant training opportunities, management strategies and quality assurance systems are already available. It is the perceptual shift, by managers in particular, which will facilitate improved quality at the depth required to respond to the complex requirements of individual learners with PCLD.

Appendices

- Appendix 1: Research Participants
- Appendix 2: Survey Form
- Appendix 3: Question Framework
- Appendix 4: Key themes from survey and initial interviews
- Appendix 5: Manifestations of culture within participant organisations
- Appendix 6: Examples of summary analysis of critical incidents
- Appendix 7: Observation of Learning and Teaching Form
- Appendix 8: Emotional Intelligence and Key Theme Alignment Table

Appendix 1: Research Participants

Organisation	Data	Research Participants						
		manager	teacher	learning support assistant	learner	other professional	parent/ carer	other stakeholder
A: specialist college	survey	3	5	3	0	1	2	0
	interview	7	5	4	2	1	3	5
	critical incidents interview	7	6	8	3	2	4	3
	observation	4	5	9	18	1	3	0
	action	7	5	21	8	2	2	3
	total individuals (69)	7	6	23	19	2	6	6
B: special school	survey	2	2	1	0	0	0	0
	interview	3	3	3	0	0	0	4
	critical incidents interview	3	5	6	0	1	0	1
	observation	3	5	16	21	2	0	0
	action	3	5	16	5	1	0	1
	total individuals (53)	3	5	17	21	3	0	4

: day centre	survey	1	1	1	0	0	0	0
	interview	3	4	8	6	0	4	1
	critical incidents interview	3	3	4	2	0	1	0
	observation	1	3	6	10	0	0	0
	action	1	3	5	2	0	2	0
	total individuals (33)	3	4	11	10	0	4	1
D: other	survey	2	5	4	0	3	0	0
	interview	5	4	2	1	0	0	5
	critical incidents interview	7	3	2	1	0	0	2
	observation	2	4	4	19	0	0	0
	action	3	7	14	0	0	0	0
	total individuals (64)	10	7	20	19	3	0	5

Notes:

1. Organisation D denotes a range of participants from organisations other than the three case study organisations.
2. Some of the participants listed under each data set are the same individuals.
3. 'Teacher' denotes the leader of a session/class, in some cases termed a lecturer or day centre officer or tutor.
4. The learner participation in observations and actions often took the form of evaluative responses. However, leading and influencing behaviours were also noted (refer to Chapter 3).
5. The composition of each of the headings listed in the data column are explained in the relevant headings in Chapter 2.
6. 'Other professionals' includes therapists and health practitioners.
7. 'Other stakeholders' includes members of governing bodies, consultants and people from funding agencies.

Appendix 2

Questionnaire

Section 1: About you and your work

1. Name

Title:

Surname:

First Name:

2. Job Title

3. Type of organisation (please tick)

Education

Health

Social Services

Voluntary

Other (please state)

4. Needs of learners in your organisation (please tick one or more)

profound and multiple learning
difficulties

severe learning difficulties

moderate/mild learning
difficulties

challenging needs

visual/hearing impairments

mental health issues

Other (please state)

5. Do you work 'hands-on' with people with profound learning difficulties?

Please tick: YES NO	Add comment if necessary:
-------------------------------	---------------------------

Section 2: About the chapter

6. Is the content relevant to your work? (Please tick)

very	mostly	partly	slightly	not

7. What is the most useful part of the chapter?

Please comment:

8. What is the least useful part of the chapter?

Please comment:

9. Is there anything which should be added?

Please comment:

The book is written for carers, practitioners and managers.

10. Is the language used appropriate?

very	mostly	partly	slightly	not

Comments on language:

Please highlight any confusing or inappropriate words on the manuscript

**11. Is the presentation clear?
(ie use of headings, diagrams, checklists etc)**

very	mostly	partly	slightly	not

Comments on presentation:

Section 3: About training

**12a. What training would be required to carry out the work described in the chapter, in your organisation?
(Please tick one or more)**

management training	
carer/practitioner training	
other (please state below)	
none (please say why below)	

12b. If you ticked 'other' or 'none', please give further comments here:

13a. If you ticked management training, what type of training would be needed?
(Please tick one or more)

introduction	
refresher	
theory	
practice	

13b. What style of training would be most suitable for management training for your organisation?
(Please tick one or more)

practical workshop	
formal presentation	
other (Please state)	

14a. If you ticked carer/practitioner training, what type of training would be needed?
(Please tick one or more)

introduction	
refresher	
theory	
practice	

14b. What style of training would be most suitable for carer/practitioner training for your organisation?
(Please tick one or more)

practical workshop	
formal presentation	
other (Please state)	

15. Please add any comments regarding training needs for your organisation:

Section 4: Comments

Please add here any general comments about the chapter.

Thank you for your time and trouble

Appendix 3: Question Framework

I was not rigid in the application of questions; I used these areas of questioning as a framework, rather than as a predefined process.

1. Explain study
2. Permission
3. Can you describe what you do and the purpose?
4. Can you give an example of when things have happened that have been good?
5. Can you give an example of when things have gone wrong?
6. If you think back, what sticks out in your mind as a key event here?
7. What ways of teaching do you think work best?
8. What sort of training do you get here?
9. Which training has had the most impact?

Appendix 4: Key themes from survey and initial interviews

Participant	Survey /initial interview	Relationships & communication	Tailor made learning	Learner control	Sample Comments
AMV1	S+II	y	y	y	'for the benefit of the students'; it's our mantra; but we believe it
AMH1	S+II	y	y	y	he was reaching out, but she didn't register he was communicating!
AMM1	S+II	y	y	y	that's what it's all about - looking and responding, not imposing
ATJ1	S	y	N	y	add relationships
ATA1	S+II	y	y	y	she pointed to it, so we changed the whole plan!
ATD1	S+II	y	y	y	you've gotta do what the guys are interested in
ATS1	S+II	y	y	y	everyone's going off and doing what they want ... asked or tried
ATL1	S+II	y	y	y	I really think she needs lots of smiles and reassurance
ATL1b	S+II	y	y	y	the important thing is he likes it and he's more settled ... doing something he likes
ASAJ2	S+II	y	y	y	I know we're teaching ... but the important thing is they enjoy it
ASAG1	S+II	y	y	y	when he actually made a choice we were ecstatic
ASAS2	S+II	y	y	y	I just feel so lucky to be here working with them and seeing them do things
APSJ5	S+II	y	N	y	I've known P a long time and I really feel she could do so much more
APCE1	S+II	N	N	N	he won't do nothing anyway
APCE2	S+II	y	N	y	likes to put the rubbish out and help out in the kitchen - keeps him from challenging
AMS4	II	y	y	y	critical things is how the staff interact with the students
AMA2	II	y	y	n	if it's what the learner needs we should do it
AMJ3	II	y	y	y	we always want what suits the students, keep improving
AMD2	II	y	y	y	he really just showed me how I need to not control everything
ASAJ4	II	y	y	y	she's always given the choice, that's what's important
ALR1	II	y	n	y	
ALR2	II	n	y	y	they let me choose it when I'm ready to
APCS5	II	y	y	y	she needs them to listen to her and communicate in her way
ASA3	II	y	n	y	going shopping, normal things, she loved it
ASS6	II	y	y	y	it's all about all those things isn't it for those students, just as it is for us

ASM3	II	y	y	y	when I see them engaged like that I feel it's really worth while
ASJ6	II	y	y	y	what we want to see is more opportunities made available
BMC1	S+II	y	y	y	that's what we're all about isn't it, not whingeing on
BML2	S+II	y	y	n	some of the teachers need some support with this type of individual approach
BMJ7	II	y	y	y	it's all about the way they communicate with her I believe
BTJ8	S+II	y	y	y	I don't know yet how to do it, but at least they were smiling
BTM4	S+II	y	n	n	I feel there's not enough focus ... too much wandering around
BTJ9	II	y	n	n	I'm the one stopping him from running off most of the time
BSAG2	S+II	y	y	y	she likes it when I'm nearby
BSAC2	II	y	y	n	we don't usually like them to go out until we have told them to
BSAD3	II	y	y	y	she wanted to know everything that we were doing all the time
BSM2	II	y	y	y	makes one feel so very fortunate that the team step up to the challenge
BSD4	II	y	y	y	we'll get through together because it's important work
BSM5	II	y	y	y	might be helpful to reflect the individual focus more clearly in the document
BSS7	II	y	y	n	if he's not able to do it physically, we need to find another way
CMJ10	S+II	y	y	y	if he chooses to go out of the room then we're ok with that
CMB1	II	y	n	y	looking to develop more exciting options for them to choose
CMD5	II	y	y	y	we're not sure really, just activity timetables, but like adult opportunities
CTJ11	S+II	y	y	y	I need to know how to go about it when you're not here
CTJ12	II	y	y	y	there's lots of ideas but not always enough help to get things going
CTM6	II	y	n	n	she's never going to be able to do anything much herself
CTN1	II	y	y	y	they mostly use eye pointing or reaching out for choices but it's still pretty clear I think
CSAD6	S+II	y	n	n	we do everything for them, they're not up to doing much
CSAM7	II	y	y	y	he'll work with me because I understand him and the way he communicates
CSAJ13	II	y	y	y	He's fantastic! I never expected him to be able to hold it let alone write
CSAC3	II	y	y	y	he's doing really well; he's quite challenging though and it's difficult if there's not enough staff
CSAJ14	II	y	y	y	she's really talented at drawing you in with her eyes

CSAN2	II	y	y	y	I'm quite happy with her really ... if she wants to go that way, we go
CSAC4	II	y	n	y	he likes going out mostly so that's what we do really
CSAL3	II	y	y	y	his progress is great since he's been with the new group
CLK1	II	y	n	n	I like you talking
CLS8	II	y	y	y	
CLM8	II	y	y	y	it's ok with the staff I trust but some of them aren't tuned into him
CPCS9	II	y	y	n	he likes him because he's intuitive
CPCJ15	II	y	y	y	not doing what the individuals want and need and that's the problem
CPCR3	II	y	y	y	not listening to us and we know them best
CPCG3	II	y	n	n	they expect us to trust them when we can't
CSA5	II	y	y	y	looking at individual needs and responding to them
DMK2	S+II	y	y	y	took my eye off the ball when we needed to focus on the basics: communication
DMA6	S+II	y	y	y	worried about undermining the opportunities because of those constraints
DMD7	II	y	y	y	the full range of learners involved
DMR4	II	y	n	y	problem with operating in a structure which mixes education expectations with social services
DMH2	II	y	y	y	not enough has been done to make sure they have a say
DTB3	S+II	y	y	n	we use everyone together to make it work
DTA7	S+II	y	n	n	we have to do it like this to meet the criteria
DTB4	II	y	y	y	they never understand that it doesn't work like that with our students
DTJ16	S+II	y	y	y	we have focussed on transition
DTC5	S+II	y	y	y	the expectations are not realistic for our learners
DSAM9	S+II	y	y	y	I like working with him because he's always totally there for the students
DSAR5	II	y	n	n	I'm not sure what he can do
DSAM10	II	y	y	y	up to us to make it possible for him
DSAD8	S+II	y	y	y	she really knows me better than I know myself; she gets under your skin
DLM11	II	y	n	n	don't think it's on letting him get away with it
DSR6	II	y	y	y	they can only achieve these things if we get better at it
DSD9	II	y	y	y	I want to make it happen for them. I'm so pleased that this can be done
DSJ17	II	y	y	y	it's about what they want to do, not just what the strategy says
DSV1	II	y	y	y	pleased to support it when I see everything that's happening there
DSJ18	II	y	y	y	it's what the learners want and capturing that

Appendix 5: Examples of manifestations of culture within participant organisations

Additional interviews were carried out in which participants were asked to recount memorable episodes in the life of their organisation (refer to critical incidents in Methodology chapter). I used a matrix analysis format (Martin, 2002:4) to identify manifestations of the culture within the participant organisations.

Themes	Practices		Artifacts			
<i>Internal / external</i>	<i>Formal</i>	<i>Informal</i>	<i>Stories</i>	<i>Ritual</i>	<i>Jargon</i>	<i>Physical Arrangements</i>
Relationships between learners & staff made explicit (A)	Relationships & communication between staff & learners identified in core principles statement, recruitment criteria, induction, training cycle	Norms re accepted ways of talking to and about learners reflected by incidents	Story of student A's 'promotion' Story of feedback from visitors	Everyone stops for tea with student		Non-formal class layout
Relationship with learner communicating through challenging behaviour (A)	Challenging behaviour policy, communications policy, core principles	Learner asking for specific staff-swapping roles.	Prior success stories – R, E, others needing 2-1 or more but no-longer. Hero tales- eg I, D	Greetings, 'meet and greet' visitors. 'Here for the students' mantra	Challenging	Seats in foyer for time away from others
Relationship with learner communicating through challenging behaviour (D)	Behaviour policy	Learners taken to Head	Learner who hit staff and staff refused to talk to him	Naughty seat		

Relationship between staff - perceived ambiguity of roles (A)	Job descriptions show clear delineation	Swapping of roles flexibly to suit students	Story of assistants leading in teacher B's classes		Acting-up	Hot desking used at all levels
Relationship between staff (B)	Job descriptions include personal care and preparation	TAs not preparing, teacher not involved in personal care	Union issue re cover Head criticising when all assembled		Role and responsibility	
Relationship between staff (C)	Broad job descriptions, staff meetings	Staff room chats, pub	Hero stories	After work staff room gathering	Soldiers	Staff room, pub close by
Communication with manager (A)	Performance review and mentor meetings	Regular chats - expectation that someone will be available to talk at any time	Story of J complaining but not getting peer approval Self analysis by S		Support meeting	Managers' offices accessible
Communication with manager (B)	Staff meeting	Head listening in	Story of lack of curriculum initiative			Intercom in each room
Communication with senior manager (C)	Meetings	No preamble	Repetitive vision no action	Behind his desk		

Relationships with externals (A)	Newsletter, local paper, prospectus, website, meetings, presentations, awards	With learners in shops, restaurants, gym etc	Shopkeeper who assumed student would create problem so hid her CD The ramp battle	Students greeting visitors		Staffing levels mostly higher when interface with public
Staff learning from learners (A)	Mentor notes, staff development strategy statement	Stopping to listen to learners in corridor	Learned from R importance of body language, voice Criticism of staff (immature) who was unable to see learner perspective Story of S (learner) teaching D about himself	End of day evaluation	Reciprocal Shared	Norm - movement between rooms
Learner led (C)	Training Displays		Makaton signing for all He can't do anything because he can't read and write story		Makaton	Makaton class held in set space
Learner led (A)	Teaching and learning policy, training Case study collection	Flexible activity	Story of E wanting to sing at awards. Story of G at work Story of R changing rooms		Choice	

Appendix 6: Examples of summary analysis of critical incidents

Refer to Chapter 2 sub-section 'Critical incidents and Critical Hermeneutics'.

Narrative Topic	Key theme	Drama	Characteristic	Metaphor
Uncertainty about purpose of activities (C)	Tailor learning	Tragedy	Referential	Lost at sea
Crawling on the floor in front of the boss, acceptable because for benefit of the learner (A)	Learner control	Satire	Contextual	All for one
Learners making staff wedding cards with error (E)	Learner control	Romance	Structural	I did it my way
Supporting other provider. They were rude to their learners (A)	Relationships	Satire	Referential	We are the champions
She listened in on our conversations (B)	Relationships	Tragedy	Contextual	The witch in the wardrobe
Mute learner has started talking (A)	Communication	Romance	Contextual	All's well that ends well
J and I disagreed, but when P (learner) tried to climb off the ride, J was there to help me (A)	Tailor learning	Comedy	Structural	The hammock can't hold him without both ends tied
They can see him (learner) getting more independent and they want to stop him (C)	Learner control	Tragedy	Structural	Desert island

OBSERVATION OF TEACHING AND LEARNING FORM

Lecturer:		Observer:	
On Probation?:	Yes / No*	Date:	
Qualified Teacher:	Yes / No*	Course Title:	
Team:		Students:	

- A. How well does the session meet learner needs?
Was planning effective & responsive to learner needs & preferences?

- B. Evidence of evaluation of teaching by team.
Is knowledge & technical competence up to date?

- C. Methods and styles of teaching and training consistent with the aims of the course and learner's personal objectives and learning styles (effective differentiation including community/vocational access)

- D. Was communication appropriate? Could other methods be used?

E. Develops with learners, individual learning plans that are informed by the initial assessment, and which are reviewed regularly.

F. Promotes good working relationships that foster learning.

G. Did you work effectively as a team?

H. Were there opportunities for student to student interaction?

I. Are therapies planned and integrated effectively into the session?

J. Manages the learning environment and makes use of learning resources (including specialist equipment & ILT) to ensure effective teaching and learning and which promote equality and diversity (please also add comments here about any aspect of Health & Safety).

Comments:

Summary of Key Strengths and Areas for Improvement

Key Strengths:

•
•
•
•

Areas for Improvement:

•
•
•
•

Summary of Grades

	Teaching	Learning
Recommended Grade		
Moderated Grade		
Overall Grade		

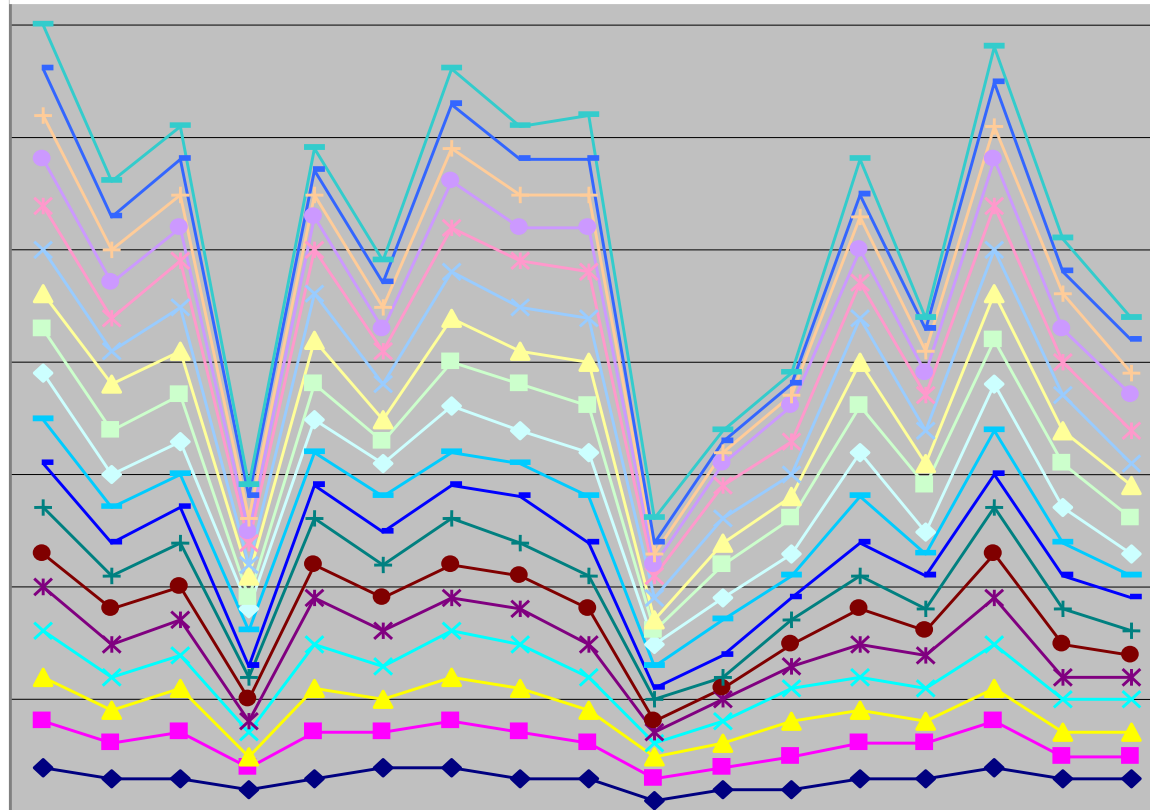
Signed Observee: Date:

Signed Observer: Date:

Signed Moderator: Date:

Appendix 8: Emotional Intelligence and Key Theme Alignment

The graph indicates that the pattern of competencies assessed for the key themes is broadly similar to that of the emotional intelligence assessments. However, as noted in Chapter 3, the scores were subjectively derived and would not be appropriate to use other than as a tool for participants for thinking about how people develop in relation to the criteria under discussion.



- Change Catalyst
- Developing Others
- Inspirational Leadership
- Organisational Awareness
- Service Orientation
- Empathy
- Optimism
- Trustworthiness
- Achievement Orientation
- Initiative
- Emotional Self Control
- Adaptability
- Self Confidence
- Self Assessment
- Emotional Self Awareness
- Learner Control
- Tailored Learning
- Relationships and Communication

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