

**REINVENTING A SCHOOL FOR THE 21<sup>ST</sup>  
CENTURY:**

**A CASE STUDY OF CHANGE IN A MARY WARD  
SCHOOL**

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## **Declaration**

I hereby declare that the work presented in this thesis is, to the best of my knowledge and in my belief, original, except as acknowledged in the text, and that the material has not been submitted, either in whole or on part, for any academic award at the Australian Catholic University or any other tertiary educational institution.

I also declare that the intellectual content of this thesis is the product of my own work, except to the extent that assistance from others in the project's design, conception or in style, presentation and linguistic expression is acknowledged.

All research procedures reported in this thesis received the approval of the Australian Catholic University Ethics Committee.

Leoni M. Degenhardt

14 February, 2006

## **Abstract**

The focus of this study is the attempt of one school, Loreto Normanhurst, to draw from its values base and traditions to develop and implement a new holistic paradigm of schooling, more relevant to the needs of its 21<sup>st</sup> century students. Loreto Normanhurst is a Catholic secondary day and boarding school for girls in the northern suburbs of Sydney, Australia. It is a school over 100 years old, associated with the 400 year old, Mary Ward, international tradition of educating women.

## *Aims*

The aims of the study were threefold: to document and analyse the process of reinvention from a 'living systems' perspective (Senge et al., 2000; Sergiovanni, 2000), while it was happening, thereby enhancing the reinvention process itself through a reflexive approach; to document and acknowledge the efforts of the members of the school community in seeking to meet the needs of its students in a 21<sup>st</sup> century context; and, through its blend of theory and practice, to contribute both to the literature on educational leadership and school reform, and to practice in schools.

## *Scope*

The study was limited to Loreto Normanhurst, the school in which the researcher is principal. A mixed methodology was adopted, although the study was chiefly qualitative. As an ethnographic case study, it incorporated phenomenological data from the school community, as well as some quantitative data. The particular situation of the researcher, however, as an insider researcher in a position of power within the community studied, necessitated some innovative methodological strategies in order to protect both the participants and the integrity of the research. The situation of the researcher led also to the incorporation of the research traditions of autoethnography and transpersonal research methodologies.

The researcher drew from the literature on change, culture and leadership to analyse and interpret data gathered, predominantly, over a five-year period. The study traces the process of reinvention within the school from 2001 to 2005. Most of the data were gathered between 2001 and 2004, although antecedent data, particularly from 1994 to 2000, were included, as well as some data from 2005, by which stage the new paradigm had been implemented for two years within the school.

## *Conclusions*

The study presents findings in three main areas: change processes in schools; educational leadership; and insider research methodology

Findings related to change processes are addressed in two parts. The first of these relates to the development, implementation and evaluation of the new educational paradigm, while the second relates to the school's attempt to 'continually reinvent' itself, thus institutionalising change (Schein, 1992). The school's values played an important role in both of these aspects of change.

Findings related to educational leadership are derived from the study of the school's reinvention processes. These findings include insights into how a range of leadership theories supported, or failed to adequately support, leadership of the reinvention process as well as the identification of twelve dilemmas associated with leadership for change in a Mary Ward school.

Findings related to methodologies for insider researchers in positions of power address the need for techniques, methods and research traditions which will protect participants and the research, as well as assisting the researcher in managing the multiple roles entailed in research of this kind.

The study concludes with important contributions to the fields of school reform, educational leadership, and insider research methodology. First, it offers a framework for the reinvention of a school and the development of a culture of continual reinvention. This is the eight-step 'Framework for Reinventing a School'. Second, it proposes a model of leadership for such a reinvention, identified as 'Contemplative-reflexive leadership for reinvention'. Third, it presents a more fully developed method for conducting insider research, which can be used by school principals and others in positions of authority. This is known as 'PIRM – Powerful Insider Research Method': a research method for use by insider researchers in positions of power in their own organisation.

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## CHAPTER 1: INTRODUCTION

The 21<sup>st</sup> century is a time of immense, possibly unparalleled, change (Naisbitt & Aburdene, 1990). Just as agrarian society gave way to the industrial revolution, the 21<sup>st</sup> century is the era of the knowledge society. In the knowledge society, information and knowledge are processed in ways which maximise learning, stimulate ingenuity and invention, and develop the capacity to initiate and cope with change (Hargreaves, 2003b). In such a society, there is a need to balance economic imperatives with social needs (Soros, 2002). The development of values, appreciation of affective issues, and commitment to community, both local and global, is as important as cognitive learning (Beare, 2001; Mitchell & Sackney, 2000; Sergiovanni, 1996; Starratt, 1996). The movement to a knowledge society obviously impacts on schools.

Current models of schooling are often inadequate to cope with the magnitude of 21<sup>st</sup> century change (Hargreaves, 2003b; Murphy, 1997; Noonan, 2002; Senge et al., 2000; M. Wood, 2002). Particularly for secondary schools, the prevailing model is an industrial age model 'separate from daily life, governed in an authoritarian manner, oriented above all to producing a standardised product, the labor input needed for the industrial-age workplace' (Senge et al., 2000, p.31), and not for the needs of people. Senge argues, 'It is a tragedy that, for most of us, school is not a place for deepening our sense of who we are and what we are committed to' (p.35). The irony is that the needs of modern industry and the current world require the antithesis of 'a standardised product' (p.510 ff.).

Rather, for the knowledge era, in addition to conventional basics, new sets of basics are needed which involve human capacities such as abstraction, insight, empathy and critical awareness. Just as the wider society needs to balance economic and social needs, schools need to balance the academic and social objectives of schooling (Beare, 2001; Sergiovanni, 2000), and to find new ways to manage the multiplicity of roles facing them (Fullan & Hargreaves, 1998; Hinton, 1997; Ramsey, 2000). In the busyness of everyday life and work, relatively few schools, however, have or make the time to reflect on such questions, yet those within them experience the stresses of systems which no longer serve their needs (L. Brown, 2002; Devine, 2002; Kohn, 2002; Lee, 2005).

Politicians and senior education administrators acknowledge that education systems need to change but are mostly removed from the reality of schools. Powerless to bring about more effective change from within schools, they impose more standardised testing and accountability measures (Department of Education, Science and Training, (DEST), 2004; Kohn, 2002; Moos, 1999; Riley, 2000; Wildy, 1999). In so doing, they often either fail to

question the underlying purpose of education and the prevailing model of schooling (Doherty, 2004b; 2004c; Forbes, 2003; Jaivin, 2002; Kohn, 2002; Riley, 2000) or follow an economic rationalist agenda, 'pushing schools to operate like businesses and to pursue the educational equivalent of profit maximisation' (MacBeath & MacDonald, 2000, p.28).

It is schools themselves, however, which are in the best position to bring about effective educational change, through constantly reflecting on and learning from their experience and the context in which they operate, engaging with the current needs of young people, and discerning the future context which those young people will actively create (Beare, 2001; Beare, Caldwell, & Millikan, 1989; Handy & Aitken, 1986; Holly, 1990; Reynolds & Packer, 1992; Senge et al., 2000). Yet schools, and teachers, can have an insular perspective (Reynolds & Packer, 1992; Riley, 1998). It is a balance of awareness of the needs of students and awareness of the needs of the wider society which is needed for schools to self-transform into places of on-going individual and community growth and learning (Argyris, 1992a; Hargreaves, 2003b; Mitchell & Sackney, 2000; Mulford, 2003; Schein, 1992; Senge et al., 2000; Silins & Mulford, 2000; Starratt, 1996).

The focus of this study is the attempt of one school, Loreto Normanhurst, to draw from its values and traditions, as well as from awareness of the external context of the school, in order to develop and implement a new paradigm of schooling. This new paradigm entailed an evolutionary change in the school community's beliefs about and perspectives on education, as well as significant change in educational practice, so that schooling would focus primarily on student growth rather than on the acquisition of subject-based knowledge. While faithful to the school's core values, this new paradigm would be responsive to changes in the school's external context and relevant to the needs of its students (all girls) and of society in the 21<sup>st</sup> century.

The school undertook a 'paradigm shift' which attempted more than a single-dimension change or innovation. This paradigm shift involved re-assessing every aspect of the school in the light of three factors: the school's enduring values as a Catholic school within the tradition of Mary Ward, its foundress; the perceived needs of contemporary girls; and the context of life and learning at the start of the 21<sup>st</sup> century. The term 'reinvention', a 'radical questioning of purpose and strategy' (Senge et al., 1999, p.493-6) (see also W. Boyd, 1996; Handy, 1990, 1995; Riley, 2001b; Schein, 1996), described the school's efforts accurately.

Within the school, the terms 'reinvention' and 'reinventing' were used to denote both a process and also an endpoint, and are used thus within this study. Through the process of reinvention, the school planned to develop and implement a new form of holistic education

emanating from its core values. The endpoint of the reinvention process, however, was a state of continual reinventing – self-generating change - as the school constantly adapted to changing needs. The process began in 2000-2001 with a strategy process, which ultimately resulted in the decision to become a ‘continually reinventing’ school. This research describes and analyses both the school’s development of a new paradigm of schooling and its process of self-evolution into a ‘continually reinventing’ school.

The remainder of this chapter outlines the purpose and significance of the research, and provides an outline of the thesis.

### ***The purpose of the study and research question***

There were several purposes of this research. The first was to document and analyse the process of reinvention within the Loreto Normanhurst school community. The study focused on the changing school culture and community as it attempted to articulate, develop and implement a new educational paradigm.

Second, the study documented the efforts of this school community to serve its students and parents, and the wider society, in ways relevant for the 21<sup>st</sup> century. Too often the work of schools goes unrecorded in the general busyness of school life. The record in this thesis reflects the ‘voices’ and the perspectives of a range of members of the school community.

Third, the research was intended to enhance the reinvention process itself. Participation in the research process, and the associated immersion in a range of literatures, enabled the principal - and with her, the school community - to engage in ‘double loop learning’ (Senge, Roberts, Ross, Smith, & Kleiner, 1994), learning that was both reflective and reflexive (Alvesson & Sköldberg, 2000). In reflective and reflexive research, participants grow by means of the research process itself, as they engage in ‘critical reflection upon experience’ (Schön, 1983).

This personal growth through research is acknowledged in the field of transpersonal research methods (Braud & Anderson, 1998), and describes the final purpose of this research: to contribute to the researcher’s own professional learning as an educator, and to her personal growth as a curious and engaged learner, through the demands and challenges of a formal research process. Such a purpose has methodological implications, which are addressed in Chapter 4, and also has the potential for blurring the boundaries between the research and the reinvention process (discussed in Chapter 5).

To achieve the purposes of this study, the following research question was developed:

## **How can a school in the Mary Ward tradition reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century?**

The sub-questions which underpin this research question, together with details of how the researcher resolved the methodological challenges of being principal of the case study school, major change agent within it, and researcher into the change processes, are discussed in detail in Chapter 4, which is devoted to research design and methodology.

### ***The significance of the study***

Three factors, in particular, mark this study as noteworthy within the research on change in schools:

1. the magnitude of the change attempted;
2. the manner in which the school drew from its values as a Catholic school, and its tradition and history as a school in the Mary Ward tradition, as both catalyst for change and the means of directing and sustaining the reinvention process; and
3. the fact that this study was undertaken by the principal of the school in question, as an insider researcher. This situation had major methodological implications, the resolution of which contributes to the literature on insider researcher methodology and may be of use to other practitioners.

The study is also significant for several other reasons. First, by blending theory and practice in the 'real' setting of a school, it adds to the literature on school change, and leadership of school change. In education, there needs to be a constant dialogue between theory and practice. Eisner (1991, p.22) refers to the problem of theorists and policy makers who are disconnected from schools:

The problems that beset our schools are typically addressed by policy makers who have little first-hand knowledge about them. As a result, we are offered 'solutions' to those problems that do not work.... We need to know what goes on in schools... To know what schools are like, their strengths and their weaknesses, we need to be able to see what occurs in them, and we need to be able to tell others what we have seen in ways that are vivid and insightful. (p.22)

Theory and research can too easily be unrelated to the 'real world' of students, teachers and schools. At the same time, teachers and administrators in schools can too easily be unreflective and oblivious to new and emerging ideas. Mitchell and Sackney (2000, p.25) refer to 'the need for educators to break out of old habits, push past comfort zones, and carve out new affiliations'. The role of reflective practitioner (Schön, 1983) as researcher has a particular significance in practical fields such as school education, since the very fact

of the researcher's insider knowledge as a practitioner may increase the value of the research in the minds of other practitioners (Smyth & Holian, 1999).

Second, this research redresses an imbalance in the focus of much educational research. It was premised on a living systems view of organisations, 'with the assertion that the fundamental nature of reality is relationships, not things' (Senge et al., 2000, p.52). The emphasis of the study was on the 'lifeworld' of the school, which Sergiovanni (2000) describes as based on its unique values and purposes, and which ideally dictates the shape of the 'systemsworld' of structures and plans.

Reinvention can be seen as a natural evolutionary process – a self-evolutionary process - within such a definition. Senge et al. (2000, p.53) endorse this view, claiming that 'a living system has the capacity to create itself'. Generally there has been too much concentration

upon the first dimension of schooling - the formal, reified, organizational structure – without looking in enough detail at the second – cultural and informal – world of values, attitudes and perceptions, which together with the third dimension – the complicated web of personal relationships within schools – will determine a school's effectiveness or ineffectiveness (Reynolds & Packer, 1992, p.179).

Third, this research may be of potential benefit to other school communities embarking on major change. Bassey's (1999) work on case study research in educational settings aimed 'to reconstruct the concept of educational case study as a prime strategy for developing educational theory which illuminates educational policy and enhances educational practice' (p.3). He expresses concern that so little formal research undertaken by practitioners is ever published and therefore never moves into the public domain for other teachers (and perhaps policy-makers) to read and reflect upon. Reynolds (1992) concurs that in the area of school effectiveness there is a need for the generation of theories which can support practitioners and also for the generation of 'good practice' case studies. This study, an educational case study, generated theories which can be used to support practitioners.

The fourth significant aspect of this research is its contribution to the literature on changing models of Catholic schools and lay leadership in the Catholic Church. As the number of religious in Australia, and worldwide, declines (Dwyer, 1993), religious orders seek to pass their specific charisms (see Glossary) on to lay people (for example, 'Loreto on-line' <http://www.loreto.org.au/> and <http://www.ibvm.org/content/view/41/159/>.) Similarly, bishops are concerned that the overall Catholic ethos of Catholic schools is passed on through lay leaders (KI-10, 2005; Putney, 2005; Sacred Congregation for Catholic Education, 1982). The reinvention process at Loreto Normanhurst was intended to reinforce the Catholic ethos and Mary Ward charism within the school. It was based on a hermeneutic process of translating the school's values into a contemporary context, as the following passage from

the school's strategy document indicates: 'We must continually reinvent Loreto Normanhurst, translating Mary Ward's values into the 21st century' (Dart, 2002). This study is therefore of value within the context of the 21<sup>st</sup> century Catholic Church.

### ***Focus of the study***

This study examined the reinvention processes within a single school, Loreto Normanhurst: an Australian, Catholic and Loreto school, in the tradition of Mary Ward. It is a long-established, non-government, day and boarding school for girls, in a northern suburb of Sydney. The study covered the period 1994-2005, with the intensive phase of data collection occurring between 2001 and the end of 2004, by which time the new learning paradigm had been implemented for a full academic year with Year 7 students.

The study adopted a mixed methodology. While some data are 'uncontested' (Creswell, 1998), and empirically undisputed, this research was based mainly on analysis of the perceptions of those involved in a major change process, thus permitting a range of perspectives and 'truths' to be recorded (Creswell, 1998; Merriam, 1988; Wolcott, 1988). The particular value of studies such as this is that 'understanding of individuals' interpretations of the world around them has to come from the inside, not the outside' (Cohen, Manion, & Morrison, 2000, p.20).

An autoethnographical approach was incorporated, because of the researcher's position in the school. Her researcher journal, kept between 2001 and 2004, was written from the perspective of an insider who held a position of power in the school and, therefore, had access to privileged information. This had many benefits, but also some drawbacks (Smyth & Holian, 1999), and these are explained in detail in Chapter 4. Nevertheless, the incorporation of a wide range of data sources and methods of collection ensured sufficient triangulation for robust conclusions to be drawn.

### ***The organisation of the thesis***

Chapter One: an introduction and overview of the study is provided in this chapter.

Chapter Two: a contextual and situational analysis which encompasses several elements is presented. The school's geographical, historical, cultural and demographic situation is described, together with a brief outline of the broader national context within which the school operated. An outline of the history and essential elements of the school's Mary Ward tradition is also provided. The chapter ends with an outline of the school's innovation history, and the antecedents for both the school's reinvention process and this study.

Chapter Three: a literature review is presented in three major sections, all of which include the role of values. The first of these addresses the concept of change. National and global political, social, economic, technological and educational trends at the start of the 21<sup>st</sup> century are briefly addressed, including the changing needs of young people, particularly girls. A range of approaches to change in schools, change theory and transition management, are also discussed. The second section examines the theory of culture. It includes an overview of learning organisations and learning communities as manifestations of continually reinventing cultures, as well as discussing the culture of schools, and of Catholic schools, in particular. The third section of the literature review consists of an overview of theories of leadership, particularly in relation to a reinventing school.

Chapter Four: research design and methodology are addressed in this chapter. This includes a discussion of the characteristics of the research traditions within which this study is situated, and an explanation of the reasons for choosing the particular research design for this study. Details relating to the data collection techniques used, and the methods of recording and analysis are included in this chapter, as well as discussion of issues related to the ethics of the research. Lastly, the issues of verification, reliability, credibility and transferability are explained.

Chapters Five, Six, Seven and Eight: analysis and discussion of the research findings are presented in these chapters, organised around the themes which emerged from the data. These themes were research processes; development of a new educational paradigm; becoming a continually reinventing school; and leadership.

In Chapter Nine, the final chapter, a range of conclusions is presented, as well as contributions to the fields of educational change, leadership and insider research methodology. This chapter ends with recommendations, based on the findings of the research, of areas which would warrant further study.

This study uses a number of terms which were peculiar to Loreto Normanhurst and the context in which it operated. A glossary of terms used in this thesis is found after Chapter 9. In addition, the multiple roles held by the researcher in this study – researcher, principal, change agent – required the development of nomenclature which would distinguish between these roles in order to avoid confusion. An explanation of the terms used to describe the researcher in this study is now provided.

## Terms used to describe the researcher in this study

Four terms are used to describe the researcher in this study:

1. insider researcher. This denotes the fact that the researcher was studying the organisation from an empathic or *emic* perspective (Denzin & Lincoln, 2000b; Flick, 1998; Goetz & LeCompte, 1984), from within the organisation, as well as from the *etic*, objective perspective of a researcher;
2. participant-as-researcher. This term denotes a further refinement of the concept of insider researcher and describes the role of this researcher as simultaneously organisational actor (Evered & Louis, 1981) in the reinvention process and researcher studying it;
3. principal/researcher. This term is used to denote situations when the researcher acted primarily and purposefully as principal but with implications for her role as researcher; and
4. researcher/principal. By contrast, this term is used to describe the researcher when acting primarily and purposefully as researcher but with implications for her role as principal.

## CHAPTER 2: CONTEXTUAL AND SITUATIONAL ANALYSIS

This chapter provides an overview of the national context within which Loreto Normanhurst operated at the start of the 21<sup>st</sup> century, before describing its community, its history, and its local situation. In so doing, the meaning of 'a school in the Mary Ward tradition' is explained. The chapter concludes with the reasons for the school's decision to attempt to reinvent itself.

### ***The political and economic context***

Numerous forces are driving change in Western countries at the start of the 21<sup>st</sup> century, and these are discussed in Chapter 3. These global changes formed the background against which the reinvention of Loreto Normanhurst took place. The Australian national context also impacted on the school and its community.

Constitutionally, education in Australia is the responsibility of each state government. However, the Australian Commonwealth government plays an expanding role in this area, particularly through control of funding. The Commonwealth government supports non-government schools with recurrent funding on a sliding scale and *per capita* basis. This funding is calculated from a complex formula related to the socio-economic status of the students in each school. The scale ranges from 13.7 per cent to 70 per cent of the Average Government School Recurrent Cost (AGSRC), which is an index of the cost of educating a student in a government school (Spooner & Dow, 2000). State governments also provide recurrent funding to non-government schools, but to a lesser degree. Approximately one-third of the Australian school-age population attends a non-government school (Australian Bureau of Statistics, 2003), either in a Catholic 'systemic' school, part of a low-fee national network of Catholic schools, or in an 'independent' school.

Loreto Normanhurst is an independent Catholic school, and receives 32.2 per cent of AGSRC under this arrangement. In 2004, total Commonwealth and state government funding to Loreto Normanhurst was \$A4025 per student, and annual tuition fees were \$A9655 for a Year 12 student. Capital funding for building maintenance and construction is almost entirely the responsibility of the school itself.

Government funding is provided to Australian non-government schools on condition that they commit to the National Goals of Schooling (Ministerial Council on Education, 1999). Australian governments therefore exercise clear and increasing influence over non-

government schools (Gardner & Williamson, 1999). In fact, the accountability measures required as conditions for 2005-2008 quadrennium funding were more prescriptive than ever before (Department of Education, Science and Training, (DEST), 2004).

These accountability measures relate to curriculum, assessment and teacher professional standards and impact on all Australian schools. In order to receive government funding, non-government schools must be registered and accredited by the appropriate authority, and operate subject to that authority's requirements. The New South Wales Board of Studies requirements are highly prescriptive, possibly the most prescriptive in Australia. Not only are particular Key Learning Areas mandated, but so too are the 'indicative hours' that must be allocated to teaching and learning in each of these areas. For example, in Years 7 to 10 all students in New South Wales must study Board of Studies syllabuses in English; Mathematics; Science; Australian History, Geography, Civics and Citizenship; a language other than English; Technology and Applied Studies; Creative and Performing Arts, and Personal Development, Health and Physical Education; including two hours per week of physical activity. Catholic schools also allow substantial time for Religious Education classes. Hence, very little discretionary time remains. This proved to be a challenge in developing a more holistic model of schooling at Loreto Normanhurst, as described in Chapter 6.

In New South Wales, state-wide standardised testing at high school level occurs at Year 7 and 8, and at Year 10, state-wide examinations are conducted for the School Certificate credential. The final school credential is the high-stakes New South Wales Higher School Certificate (HSC). Results from HSC examinations and school assessments are iteratively moderated to produce the University Admissions Index (UAI), which ranks students for the purpose of determining access to university courses. Teachers' qualifications and work are also increasingly being mandated by government.

At state level, the New South Wales Institute of Teachers was established by Act of Parliament in 2004 (see <http://www.nswteachers.nsw.edu.au/library/Act.html>). Its provisions require accreditation of all new teachers, mandatory professional development and adherence to professional teaching standards. In future, the work of the Institute will encompass current practitioners and teacher leaders. At national level, the National Institute for Quality Teaching and School Leadership (NIQTSL) (from December 2005, renamed Teaching Australia) was set up in June 2004 as an independent body with funding from the Commonwealth government to support and advance the effectiveness and standing of the teaching profession. While instigated by the four peak bodies of school principals, the Commonwealth government retains control of this body. In November 2005, a series of professional standards for school leaders was under consideration by NIQTSL.

These trends in Australia reflect international trends for government to mandate accountability measures for schools, as discussed in Chapter 3. No school is unaffected. It is within this broader political context that the specific educational work of Loreto Normanhurst needs to be situated, and its status as an 'independent' school needs to be understood.

## ***The school context***

### **The school community**

Founded in 1897, Loreto Normanhurst is situated in a leafy, relatively affluent suburb about 24 kilometres from the centre of Sydney. The area is well-serviced by public transport and amenities, and surrounded by a range of other long-established and highly-regarded schools. Loreto Normanhurst is part of both a national and international network of schools in the tradition of Mary Ward (1585-1645), the English woman who founded the Catholic order of religious sisters, the Institute of the Blessed Virgin Mary (IBVM), also known as the Loreto sisters. More detail is provided about Mary Ward and the Loreto sisters later in this chapter.

The school's buildings and facilities, situated on 25 acres (12 hectares) of gardens, ovals and heritage bushland, range from the original heritage buildings, now used as reception areas and boarding accommodation, many traditional classrooms from the 1960s, through to the aquatic centre and learning resource centre (LRC), completed in 2000, and two new flexible learning spaces completed in 2004 and 2005. Student artworks cover the walls, together with framed copies of the school's Mission Statement (see Appendix 1) and awards won by the school, its students and staff. A walk through the corridors at break times reveals much friendly interaction between staff and students. Visitors to the school frequently comment on the 'warm feel' of the school, the friendliness and courtesy of the students, and the atmosphere of engaged learning. Students and staff express a sense of pride in the school in conversations with each other, with those outside the school, including potential students and staff members, and in annual anonymous surveys.

In 2004, Loreto Normanhurst had an enrolment of approximately 900 students, about 20 per cent of whom were boarders, almost all from country New South Wales. The boarding school is central to the school's self-concept, since Loreto Normanhurst was originally established as a boarding school only, a service to country parents, and also because the school operates '24/7', with some 200 people in residence during term time. Day students come from a wide arc of surrounding areas, which include well-established, elegant suburbs, newer, relatively affluent suburbs, and small acreages, with a growing number of

students commuting daily from Central Coast areas up to fifty kilometres away. Typical of the suburbs and rural areas from which the school draws its clientele, in 2004, less than six per cent of the student enrolment came from language backgrounds other than English, and no indigenous students were enrolled.

The school consistently has more applicants than there are places in the school. Despite the fact that it is not academically selective, Loreto Normanhurst achieves strongly in external examinations (see Table 6.6). The main criterion for enrolment selection is congruence with the values of the school, as determined by evidence provided by parents (see Enrolment Policy, Appendix 2). Most of the students enrolled come from self-nominating Catholic families, although approximately nine per cent of the 2004 student enrolment came from religious backgrounds other than Catholic. Parents are expected to be active partners in their daughters' education. Parents are happy with the school (see Chapter 6) and students also exhibit and express high levels of satisfaction with the school and with their teachers (see Tables 6.9 and 6.10).

In 2001, at the start of the school's strategy process, the teaching staff of 84 teachers - 78.3 full-time equivalent (FTE) - was predominantly female and a third were over fifty years old. A number had been teaching at the school for many years, although older teachers retiring were often replaced by younger staff, thus helping to achieve a better age balance. A combination of retirement, teachers wishing to become part-time or job-share as they neared retirement, long service leave and maternity leave, as well as teachers taking up promotion positions elsewhere and/or relocating to other areas or cities, caused some turnover of teachers. While this led to some lack of continuity, it also enabled the school to benefit from the new ideas and experience of incoming staff. Table 2.1 gives details of the percentage of teachers who left the school between 2001 and 2004.

Percentage of permanently-employed teachers who left Loreto Normanhurst between 2001-2004	2001	2002	2003	2004
	8%	11%	11%	13%

**Table 2.1 Percentage of teachers who left Loreto Normanhurst 2001 - 2004**

Loreto Normanhurst is a complex organisation. As well as teachers, a broad range of other staff, including boarding, school support, grounds and maintenance and non-teaching professional staff, are employed. Excluding sport coaches and visiting instrumental music teachers, the total number of teaching and non-teaching staff on the payroll in 2004 was 165. Table 2.2 illustrates the changes in staff demographics between 1995 and 2005, from which several conclusions can be drawn.

	Number of teachers (FTE)	Number of teachers (neonile)	Number of support staff (FTE)	Student-teacher ratio	Age of teachers: < 30	Age of teachers: 31 -40	Age of teachers: 41-50	Age of teachers: 51-60	Age of teachers: over 60	Average age of teachers	Length of service at LN: 0-5 years	Length of service at LN: 6-10 years	Length of service at LN: 11-15 years	Length of service at LN: > 15 years	Teachers who are Catholic
					%	%	%	%	%		%	%	%	%	%
1995*	64.6	66	16.5	1:12.5											
2001*	76.0	81	21.9	1:11.5	20.7	15.8	30.5	33.0	0	n/a	52.4	15.9	21.9	9.8	n/a
2002	78.3	84	27.3	1:11.5	11.5	22.7	34.3	31.5	0	44.5	59.6	9.7	20.0	8.7	47.6
2003	80.4	89	27.9	1:11.2	16.9	22.4	29.2	28.1	3.3	43.6	59.5	12.4	14.6	13.5	55.1
2004	81.9	89	32.9	1:11.0	13.4	28.2	29.2	25.9	3.3	44.3	50.6	22.5	10.1	16.8	55.1
2005	82.1	91	32.7	1:10.7	16.5	24.2	27.5	24.1	7.7	43.4	57.1	17.6	5.5	19.8	60.4

**Table 2.2 Staff at Loreto Normanhurst - demographic changes 1995 - 2005**

(\* Data were not collected on some variables in 1995 and 2001.)

First, as anticipated in 1994 (strat plan08), the numbers and functions of school support staff increased to cover areas such as archives, web support, fundraising, community development, clerical support of curriculum and administration. Second, the principal sought to employ able young teachers to learn from the wisdom of experienced older teachers, whom she valued and sought to retain until they were ready to retire. This is reflected in the gradual increase in the percentage of teachers under forty years old and the increase in those over sixty, although the average age of teachers changed little. Third, the proportion of Catholic teachers increased. As the school increasingly required all teachers to actively promote the values and ethos of the school (see Chapter 6), a mutual self-selection process was at work between prospective teachers and the principal. Fourth, in line with wider trends, the student-teacher ratio gradually decreased. Within Loreto Normanhurst, this trend was magnified by the fact that additional teachers were required to resource the preparation and implementation of the new learning paradigm, and this was reflected in staffing increases in 2003 and 2004. (By the time the new paradigm is fully implemented across Years 7 – 12 in 2008, the anticipated extra cost is six per cent of teacher salaries.) The fall in the student-teacher ratio in 2005 was not intentional, but the result of a slight drop in student numbers caused by a higher than usual increase in school fees and possible nervousness among the school community in the first year of implementation of the LNSGM. In 2006, the student-teacher ratio is expected to more closely resemble 2004 levels.

A further issue relevant to the school community was the nature of the person appointed as principal. After almost one hundred years of religious sisters leading the school, this

researcher, a laywoman, took up the role of principal in April 1994. She herself had not been educated within the Loreto tradition. The impact of lay leadership on the school community was substantial, and is discussed further in Chapters 5, 7 and 8. However, as well as having a particular internal context, Loreto Normanhurst is also embedded in a contemporary local community (Hargreaves & Fullan, 1998; Murphy & Louis, 1994).

## **The local community**

The school occupies a site bordered by residential streets on two sides, and fronts onto a major road. Particularly from 2000, the school sought to become more 'porous', welcoming and responding to the local community in which it is embedded, and also to adopt a more entrepreneurial approach in allowing the school's facilities to be used by community groups (strat plan08) (Hargreaves & Fullan, 1998). In fact, when the school's architectural master plan was completed in 1996, the first group to be shown the plans, and included in the discussion, were the local residents and the mayor of the local municipal council.

Nevertheless, relationships with some local residents became strained as the school became more 'busy', resulting in more traffic, and visitors parking in the streets surrounding the school. Problems with neighbours impacted on the reinvention of the school. As well as being philosophically committed to being more accessible to the wider community, the school was relying on being able to hire out its facilities in non-school hours in order to bring in additional income to both fund any extra costs of the new paradigm and also to hedge against a possible future reduction in government funding. In order to work collaboratively with the school's neighbours, to hear and address resident concerns, and also to explain the school's plans to neighbours, the principal established a 'Residents' Liaison Committee' in 2001, with representative membership based on residents' location relative to the school. Over time, this committee became an increasingly valuable consultation mechanism, although some members remained resolutely opposed to the school and the principal. The negative attitudes of a small number of neighbours impacted on some other residents and also on the local municipal council.

Interactions with this council had been difficult since 1997, particularly between 2001 and 2004. In this time, the school had put forward several building applications for approval, most of which were either rejected or had restrictive and/or expensive conditions attached, such as preventing the aquatic centre and gymnasium being used by the local community, and imposing a limit on the school's student population. Scarce energy and funds were expended on efforts at conciliation, meeting the council's requirements, and taking legal action. By mid-2005, the major issues had been resolved, but the process was a constant challenge and drained energy and resources away from the reinvention process. For

some, these issues were particularly upsetting, since the school's presence in the local community long predated the arrival of other residents and the formation of the local council. Yet the school's history can be traced back some 400 years further, to the foundress of the IBVM, Mary Ward.

## ***The historical context – the IBVM/Loreto tradition***

### **Mary Ward and the IBVM tradition**

Mary Ward was born in England in 1585 into an upper class Catholic family, in a time of fierce religious passion and bigotry. Like many Englishwomen from the higher classes, Mary Ward enjoyed greater freedom and independence than was available to women in most Catholic countries at that time. Contrary to the norm for women in those times (Rofe, 1985), she had received a balanced classical education. Surrounded by strong recusant women who upheld the Catholic faith within their homes and communities in the face of persecution, imprisonment or execution, Mary Ward grew up with a firm belief in the capacity of women to contribute significantly to both Church and society (Margaret Mary, 1955; McClory, 2000; Rofe, 1985). Cameron (2000) claims, in fact, that one of the consequences of the lack of a formal Catholic church hierarchy in England during the Reformation was the opportunity it gave to lay people, both men and women, to exercise initiative.

It is therefore not surprising that Mary Ward was open to new ideas. She strove to establish a radically new way for women to live their commitment to God, and to the Church and its mission, in 'the first international experiment of active women religious' (Zagano, 1993, p.54). Based on the Jesuit *Formula* (Rofe, 1985; Stevenson, 1996; Wright, 1997), the religious order established by Mary Ward was ultimately called the Institute of the Blessed Virgin Mary (IBVM). The education of girls was, and remains, a core aspect of the IBVM charism (Cameron, 2000; M. Chambers, 1882; Cover, 1997; McClory, 2000; Orchard, 1985; Rofe, 1985; Wright, 1997). Other aspects of the charism were articulated in Mary Ward's plan of the Institute, presented to Pope Gregory XV in 1621, which sought:

1. to follow a mixed life of contemplation and apostolic activity;
2. to be subject to the Pope alone and not to the jurisdiction of a male religious order;
3. to dispense with enclosure in order to be able to pursue apostolic work;
4. to wear contemporary dress rather than a religious habit; and
5. to be able to dismiss members even after profession, for grave reasons (M. Chambers, 1882; Rofe, 1985).

Based on this charism, a network of IBVM convents and schools was quickly established throughout England and Europe, in Belgium, Bavaria, Austria, Hungary, and Italy. Yet the establishment of the Institute of the Blessed Virgin Mary was not without its difficulties (Cameron, 2000; M. Chambers, 1882; McClory, 2000; Wright, 1997). As well as her ongoing battle with ill health, Mary Ward underwent perilous journeys on sea and land, 'challenge from within the group she founded, opposition from without, [and] imprisonment as a heretic' (Rofe, 1985, p.4). Despite these difficulties, her commitment to her vision for the Institute, which she saw as God's will for her, was unshakeable, as was her persistence. Finally, the Pope suppressed the Institute in 1631, causing the closure of all the Institute convents and schools and the disbanding of the nuns. Mary Ward died in 1645, at the age of sixty, an apparent failure. It was only in 1909 that she was publicly acknowledged as foundress of the Institute.

Before their enforced closure, the many schools throughout England and Europe that Mary Ward and her companions established for girls were notable for their educational innovations (Cameron, 2000). The broad liberal education they offered was holistic in approach, emphasised the creative arts and respected intellectual rigour and breadth. Like the Society of Jesus (Jesuits), Mary Ward subscribed to the humanist tradition of the Renaissance, premised on the belief that religious and moral inspiration could be found even in pagan authors. 'Her curriculum, which included modern languages, drama, dancing and music, appears to follow that of the Jesuit schools of her day' (Wright, 1981, p.34). She sought to form habits of reflection and discernment in making choices and 'referring all things to God'. There was an understanding that 'the teaching under the teaching' is important: sincere relationships were central to the learning and development of all in the school community. The adults provided sound modelling, trying to influence their students more by their example than by their words. They repeatedly inculcated in one another the importance of loving their students (Rofe, 1985), of knowing them as individuals, of enjoying a respectful *familiaritas* with them (Cameron, 2000). Mary Ward also emphasised the need for deep joy, or felicity. As she said to her sisters: 'In our calling, a cheerful mind, a good understanding, and a great desire after virtue are necessary, but of all three a cheerful mind is the most so' (Cameron, 2000, p.208).

Mary Ward encouraged the pursuit of excellence, not in a competitive or perfectionist sense, but through doing one's best and then relying on God to do the rest. Also significant in her educational endeavours were a commitment to social justice, and adaptations of curriculum and structures to meet the needs of particular community circumstances. Hence, she set up trade schools to enable girls from poor families to learn

a means of earning their living in ways other than prostitution, and to encourage them to live a Christian and morally good life (Cameron, 2000).

Typical of Mary Ward's system of education were the following attributes:

- Striving after the truth; and training in self-discipline so that all in the school would realise their duties towards God, others and themselves;
- The expectation of a high standard of bearing and behaviour from all students;
- Training in character together with religious formation, with no place for strictness or rigidity;
- Valuing the cooperation of parents in the work of education;
- Insistence on the appropriate qualifications of teachers;
- General culture as well as solid education were equally valued; and
- The willingness to adapt methods, while retaining ideals (Wright, 1981).

'Thus her philosophy of education was both Christian and humanistic, as she had a high regard for secular learning as a civilizing experience, and a Christian concern for the dignity of the individual' (Wright, 1981, p.33).

Mary Ward strove to educate in and for society, not apart from it, and to educate young women 'in the Christian virtues and liberal arts so that they may be able thereafter to undertake more fruitfully the secular and monastic life, according to the vocation of each' (Orchard, 1985, p.35). In her view, 'education was an advantage not a danger' (Rofe, 1985, p.12), and her emphasis on education as liberation resonated with the high value she placed on 'freedom' (Rofe, 1985). Among parents and many authorities, Mary Ward's schools had a reputation for excellence because of 'the quality of teaching demanded by the foundress and given generously by all the members, the challenge to every pupil to realise her fullest potential as a Catholic woman, and the context of free, loving partnership between nuns and students' (Cameron, 2000, p.192).

Mary Ward also accepted the challenge of change: a faithful Catholic, she was nevertheless committed to genuine reform and renewal of the Church at all times (McClory, 2000). Many followers of Mary Ward, the sisters of the Institute of the Blessed Virgin Mary (IBVM), carried on her visionary work in the education of women and works of social justice across the centuries and across the world. IBVM sisters are also known in many parts of the world as Loreto sisters. These terms are used interchangeably in reality as well as throughout this thesis. Many of these followers, especially Mary Gonzaga Barry, also provided inspiration to the Loreto Normanhurst school community as it sought to reinvent itself.

## The Mary Ward tradition in Australia

In 1875, some three hundred years after the death of Mary Ward, the first band of Loreto sisters came from Ireland to Australia, led by Mother Mary Gonzaga Barry (M. G. Barry, 1875). Three of this first band of sisters are buried in the school's bushland cemetery, a visible connection with the school's history and origin.

Mary Gonzaga Barry was born in 1834 in Wexford, Ireland. She was educated at Loreto schools and entered the IBVM in 1853. Despite initial misgivings – she was over 40, deaf in one ear, and considered her best years behind her – Mary Gonzaga Barry responded to an appeal from the Bishop of Ballarat for Loreto sisters to come to Australia to establish schools for Catholic girls, at the time of the gold rushes in Victoria. The work of the sisters was far-reaching and well-respected.

In an amazingly short time, the schools in Ballarat run by the IBVM were meeting a variety of needs in the district: preparation for university-entrance, theological education and retreats, unique kindergarten facilities, free parish-based education for those who could not afford fees, specialist tuition in music and drama, and practical education in home management. The schools modelled what Gonzaga Barry called 'a sensible school for girls'. (Rofe, 1997, p.3)

Mother Barry was herself an educational visionary, respected in the Australian education world for her educational innovations and establishment of schools, pre-schools and teacher training colleges (Wright, 1981). She was one of the earliest proponents of a holistic education, and was influenced by the writings of Froebel (KI-25). Aware of a chronic shortage of professionally trained teachers who could teach in this way, in 1884 Gonzaga Barry established a teacher training college in Ballarat, followed, in 1896, by the opening of the Albert Park College in Melbourne. She believed that continual professional development fostered excellence in teaching and, in calling for 'A Women's Education Congress' where the Heads of girls' schools could meet in mutual support, she demonstrated Mary Ward's passionate belief in the capacity of women and the value of their particular insights:

Nothing but mutual advantage can arise from an interchange of ideas and experience; in short, what is to prevent [the Heads] from taking an independent, original view of education from a woman's standpoint and so checking and correcting and completing the theories on education still in vogue and which we owe nearly all to men – often to '*doctrinaires*' and charlatans? (M. G. Barry, 1891)

Early resistance amongst traditional Victorian families to the notion of education for girls prompted Gonzaga Barry to wage a sustained campaign to convince parents of its worth. In 1886, she established a biannual school magazine, *Eucalyptus Blossoms*, which had a two-fold purpose: to showcase the talents and achievements of Loreto students, and also

to promote her ideal of a complete education for girls, and most particularly, the value of a university education.

Under Gonzaga Barry, Loreto students were amongst the first in Australia to receive university-standard lectures in preparation for tertiary studies. The curriculum at Loreto Ballarat included several languages, higher Mathematics, the study of Fine Arts, Music, and Science, including Chemistry and Astronomy. While being conscious of maintaining high standards, 'lest it should be thought we are so occupied with prayer and piety as to neglect work' (M. G. Barry, 1890), Mother Gonzaga realised that an education should not be solely geared towards achieving high grades.

Rather it is the achievement of personal maturity, full adulthood, individual character formation, together with the ability to contribute responsibly to the family, the Church and society which is stressed in all her reflections. It is also clear that in her view, this responsible adulthood could only be reached by a balanced development of the religious, intellectual, physical, artistic and affective aspects of the person. (Wright, 1981, p.37).

Like Mary Ward and others before her, Gonzaga Barry had a commitment to social justice. This sense of social justice was passed on to the students, a tradition which continues today. In 1889 Mother Gonzaga called upon her ex-pupils to form a 'Federation': to unite and, as a body, provide services to those less fortunate than themselves. By 1912, Mother Gonzaga had sufficient support from this 'federation' to open a free kindergarten in South Melbourne, with voluntary help being provided by members of the Loreto Past Pupils' Association. In addition, she continued to open schools across Australia. Gonzaga Barry established Loreto Normanhurst in 1897, as a boarding school for the daughters of Catholic families from country New South Wales.

### **The Mary Ward tradition in 21<sup>st</sup> century Australia**

In 21<sup>st</sup> century Australian Loreto schools, there remains an emphasis on a broad liberal education, which values the creative arts and develops awareness of social justice issues. The values which Mary Ward practised and preached – love of Jesus, freedom, justice, sincerity, verity, felicity and a profound belief in the capacity of women as significant contributors to both Church and society – are celebrated in contemporary Mary Ward schools throughout the world (see [www.ibvm.org](http://www.ibvm.org)). In 1998, the seven Australian schools in the Mary Ward tradition collaborated to develop a shared Mission Statement for Australian Loreto Schools (Honner, 1998), which attempts to translate those values into present-day reality. Mary Ward's inheritance of liberal thinking, breadth of vision, foresight, risk-taking and unshakeable belief in the potential of women, impacts significantly on all these schools.

Mary Ward was always a loyal member of the Catholic Church (McClory, 2000). Loreto Normanhurst, as a school in the Mary Ward tradition, is first a Catholic school and this is core to its identity. Chapter 3 outlines some of the implications of being a Catholic school in Australia in the early 21<sup>st</sup> century. Among Australian Catholic schools, Loreto Normanhurst is known as a 'congregational' Catholic school because it is under the control of a religious congregation rather than directly controlled by a bishop through a Catholic Education Office, which administers Catholic 'systemic' schools. Such congregational Catholic schools usually offer a broader range of curricular and co-curricular offerings, have a lower student-staff ratio and charge higher fees to cover these costs. Congregationally-owned schools are essentially Catholic schools, whose adherence to the core values of all Catholic schools is mediated through the charism of their religious congregation or Institute. It is the duty of those in leadership and governance positions to nurture and develop these values.

## ***Governance and leadership***

### **IBVM ownership and oversight**

The number of religious in Australia is diminishing overall, particularly in schools (Cannon, 2004; Catholic Education Commission, 2005). This is also true for the Loreto sisters who, since the 1980s, have developed structures to enable the Mary Ward charism to continue into the future (Wright, 1981). These structures include the establishment of governing bodies for each of the Loreto schools in Australia, on each of which there are two Loreto sisters; the drawing up of legal and financial agreements between each school and the IBVM leadership body; and the setting up of the Loreto Education Board, which administers the work of the seven School Councils.

The IBVM sisters exercise a pivotal function in relation to the Catholic nature of Loreto schools. Their elected leader, the Provincial Superior, is the 'juridical person', to whom the local Catholic bishop delegates the authority to run a Catholic school, thus connecting Loreto Normanhurst to the wider Catholic Church. Further, the sisters are involved in their schools in a range of ways, through committee membership, providing in-service workshops, regular gatherings and conferences, and maintaining friendships and relationships with people in Loreto schools. Although since 2001 there has been no full-time sister on the staff of the school, the influence of the IBVM on the school remains substantial through these other means.

## **The Loreto Normanhurst School Council**

The Loreto Normanhurst School Council was inaugurated in 1992 and, as the governing body of Loreto Normanhurst, is accountable to the IBVM and responsible for the employment of the principal, the continuation of the school's values and charism, and for its fiscal health and management. Since the school's annual budget in 2004 was well over \$A13 million, this is a considerable responsibility. The School Council is assisted in these tasks by several committees: the Finance Committee, the Property Committee, the Development Committee and the Bursary Committee. The principal, while not a member, attends all meetings of the School Council and its committees.

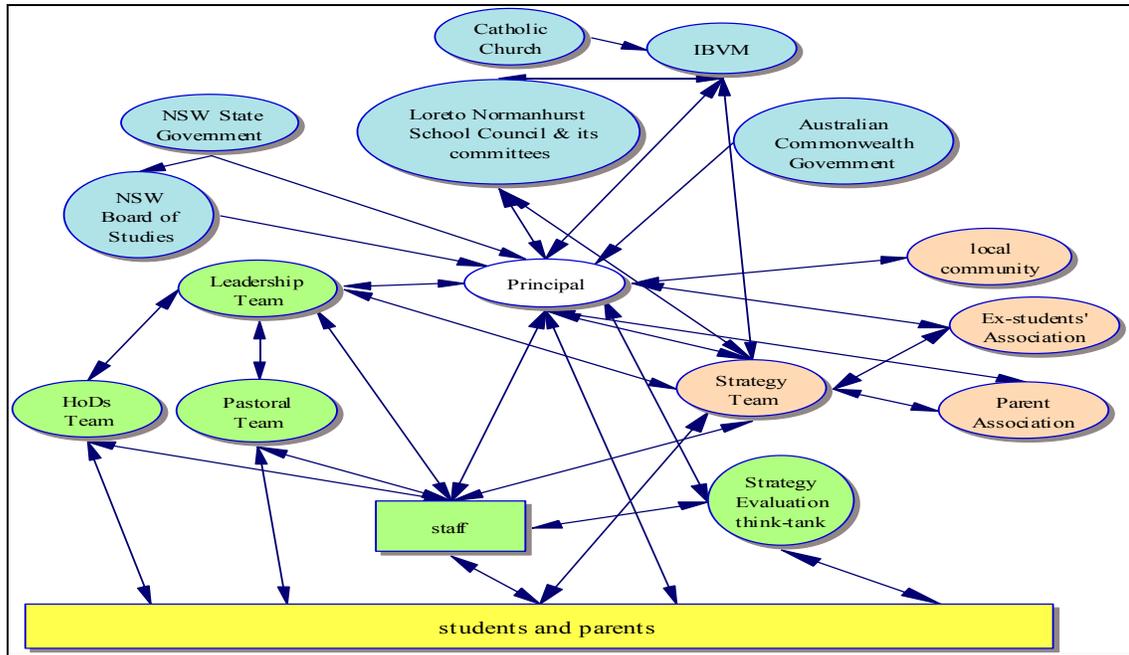
The current Chair of the School Council, appointed in 2001, played a pivotal role in the school's strategy process, supporting the direction of the school as well as the principal, particularly in the most difficult times of the reinvention processes, as discussed in Chapters 6 and 7. The Chair is also the formal point of contact between the school and the Loreto sisters. There is a network of IBVM support for both the School Councils and for the principals of each of the Loreto schools throughout Australia.

## **Leadership structures within the school**

Leadership structures within the school had evolved since 1994, when the principal and two deputy principals led the school. By 2004 the Leadership Team consisted of ten people, some of whom were connected to the educational function of the school, and others to the school as organisation. Although the principal had overall responsibility for every aspect of the school, the following portfolios were delegated to and managed by members of the Leadership Team: student learning; pastoral care; professional learning; mission; boarding; information and communication technology (ICT); capital fund-raising and community relationships; human resources; finance and property. Members of the Leadership Team worked hard, and with extraordinary commitment, to 'weave' a consistent fabric from the many threads and networks of school life, and connect these to the school's overall direction for the future. Figure 2.1 illustrates some of the networks within and beyond the school.

## **Networks within the school and beyond**

Significant among these networks were the two groups of middle managers within the school, the Heads of Department (HoDs) team and the Pastoral Team. These middle manager groups played a significant role in the reinvention process, as discussed in Chapter 7. There were many other networks which connected Loreto Normanhurst to its constituents and to local, educational and Catholic bodies.



**Figure 2.1 Relationships and networks within and beyond Loreto Normanhurst**

Within the school community, a Student Council of elected Year 12 students connects the student body to school structures. The Parent Association of Loreto plays a similar role for parents, with an annually elected Executive who interacted regularly with members of the Leadership Team. The Boarder Parent Committee, connected to the Parent Association and the Leadership Team, was a further network for country parents. An Ex-students' Association, with an annually elected Executive, also maintained a close connection with the school, and provided bursaries for needy families.

Further, as an independent school, Loreto Normanhurst is part of other networks, for example, the Association of Independent Schools (AIS), the Associations of Heads of Independent Schools (AHISA) and of Independent Girls' Schools (AHIGS), and the Alliance of Girls' Schools. These networks provide opportunities for professional learning and support. Since the principal/researcher was actively involved in these groups, new ideas were imported into her thinking and into the school.

To summarise, the reinvention of Loreto Normanhurst needs to be seen within a broad national context, and also a global context, as discussed in Chapter 3. The particular situation of the school also needs to be understood, and this includes its innovation history, back to Mary Ward's time in the 17<sup>th</sup> century, as well as in more recent times. Louis and Miles (1990) argue that a school's innovation history can have a major impact on the outcome of a change process. Within Loreto Normanhurst, there was a history of successful change and innovation which provided support for the reinvention.

## ***Innovation history of Loreto Normanhurst***

Mary Ward's ideas were too radical to be accepted in her own time, in view of the prevailing attitudes towards women, particularly among some Catholic clergy and Vatican authorities (Cameron, 2000; McClory, 2000; Wright, 1997). She was referred to pejoratively as a 'dangerous innovator' by her contemporary detractors. Yet this description of the foundress served to inspire the Loreto Normanhurst school community to follow in her footsteps and to be risk-takers in finding ways of meeting the needs of girls in a new century. From 1994, the year from which data were collected for this study, the school community had grappled with the not insubstantial challenges of changing in order to meet these new and emerging needs.

### **Antecedents (1994-1999)**

In 1994, after the arrival of the first lay principal in its history, the school community engaged in a consultative process to discern the school's future direction, and to articulate its vision and values. The result of this process was the development of a Mission Statement (see Appendix 1) and a strategy for the future, outlined in the document *Future Directions 1994 -1999*.

The school had a long and proud history, but the 1996 formal review of the school (Keane, McGuirk, & Burke, 1996), while endorsing the strengths of the school, also noted that the school's financial reserves had been gradually depleting over almost a decade and there were some concerns about enrolment and academic results in the HSC (see Table 6.6). A School Council member of the time expressed 'the belief that Loreto's viability in the future is closely linked with improved academic achievement and standing in the community' (Keane et al., 1996, p.18). Later, some parents spoke of having been at the point of withdrawing their daughters at this time (IF05). The review report also identified many recent changes at Loreto Normanhurst. The review panel agreed with the reflection of a member of staff that, in 1996, the school was 'in a time of "deep cultural shift"' (p.14), caused by several factors:

1. the establishment of the Loreto Normanhurst School Council in 1992, with responsibility for ensuring that the IBVM philosophy was maintained and promoted;
2. the appointment of the first lay principal in 1994, and a reduced presence of IBVM sisters on staff;
3. the move towards longer-term systematic planning for the school, including a masterplan;
4. an approach to decision-making which involved staff in processes which affected the operation of the whole school;

5. new appointments in senior leadership positions, and new calls for subject coordinators to assume greater educational leadership;
6. the pursuit of a number of curriculum and pedagogical initiatives, including the incorporation of technology, autonomous learning, evaluation of curriculum offerings and review of the religious dimension of the school; and
7. the establishment of a Development Office, with responsibility for marketing and capital fundraising.

While documenting the favourable views of the school held by parents and students, and the sense of pride and professionalism in the teaching staff, the report also identified ambivalence towards change within the teaching staff, noting that many staff had been associated with the school for many years (Keane et al., 1996, p.21). For many of these people, the changes were threatening and led to 'feelings of anxiety, uncertainty, fear as well as a sense of hope and expectation' (Keane et al., 1996, p.21).

The *Future Directions 1994 -1999* strategy provided a collaboratively-discerned direction for the school. It helped the school community to focus on the future and provided members, including the principal and School Council, with some experience in developing strategy for a school. At the end of this strategy period, in November 1999, the principal wrote in her report to the School Council, 'The completion of this summative report concludes this phase of our history and also provides us with a reflective tool to begin the next phase. I anticipate that we need to begin 2000 with a new phase of strategic planning' (SC03).

### **Deciding on the new strategy process (2000)**

Early in 2000 the principal discussed with the Leadership Team the need for a new strategy process in the following comments:

The challenge is to find a framework that will allow us to focus simultaneously on many aspects:

- correlation with the 'strategic issues' that School Council is about to work on;
- meta-level issues within the School eg the question of whether to use a quality framework;
- the vision and plans that each of us has for his/her own area of responsibility;
- as well as being transparent, collaborative and inclusive in its methodology and philosophy' (strat plan06).

The Leadership Team set about planning for the school's next strategy, and the School Council formally approved the process thus developed on 18 June 2000 (strat plan03). 2000 was in many ways an auspicious time for such an endeavour:

1. 2000 was the millennium year, the Year of Jubilee within the Christian tradition, a time to take stock;

2. The Deputy Principal/Director of Pastoral Care was retiring at the end of 2000, after almost twenty years in the school. Her contribution was appreciated, yet her retirement created new opportunities. A new deputy principal, who also had a long association with the Loreto charism, was appointed from outside the school;
3. The only remaining Loreto sister on staff (there had been five in 1994) was leaving the school at the end of 2000. Her presence had been a 'visible clue' to the values and history of the school. The school had to work even harder to ensure that these aspects continued to be a lived reality in the school;
4. The school's move to a vertical pastoral care structure at the end of 1998, after careful planning for more than two years, was recognised by the school community as a successful innovation based on student needs;
5. A major building program had just been completed, delivering a state of the art Learning Resources Centre (LRC) and aquatic centre to the school community;
6. There had been a major emphasis within the school on teacher learning and student learning:
  - a. led by an Autonomous Learning Committee of volunteer teachers, there had been an emphasis on metacognition across the school for several years. Discussion of learning theory and sharing of best practice became more widespread, and the school began to adopt a student-centred, constructivist approach (Piaget, 1990; Vygotsky, 1962) to learning;
  - b. learning consultants had been engaged to work with the teaching staff. Their work was appreciated and incorporated into the practice of many faculties;
  - c. a number of teachers were involved in practitioner enquiry projects associated with their pedagogy, for which credit towards a Masters degree had been negotiated with a local university;
  - d. the 'Loreto 5' innovation, begun in 1999, was valued by staff and seen as another example of successful innovation. Loreto 5 was an annual application-based professional development process, internal to the school, in which the five successful applicants worked together, and with expert support and 0.2 release time over a full year, on a combination of learning theory, information literacy and ICT skills. They worked on their own projects and were expected to produce a web-based unit of work for students, which could be used by their faculty. This process not only increased collaborative professional discourse and made teaching a more public activity but it required teachers to submit an application and undergo

an interview process, all of which increased their levels of reflection on practice (Boud & Griffin, 1987; Schön, 1983; van Manen, 1991);

7. Significant ICT milestones had been achieved. For example, after several years of incremental budgeting, by 2000 every teacher had a school-provided laptop and the school was seen as cutting-edge in the incorporation of ICT into learning, with the support of significant professional development, including the 'Loreto 5' innovation; and
8. Students' results in high stakes examinations had improved significantly (see Table 6.6).

It was therefore an opportunity to work from a position of success in beginning a new strategy process.

The 2001 school year began with a series of strategy workshops (see Chapter 6 for details). Within these workshops, Loreto Normanhurst community members concluded that the 21<sup>st</sup> century world, in the magnitude of change and shifting worldviews, was analogous to the Reformation, the time in which Mary Ward lived. Much was learned from studying how a visionary religious and educator, fired by passionate creativity, was able to conceive and implement new ways of being church and new ways of education for her time. It was this hermeneutic action, of constantly attempting to translate constant values into a rapidly changing contemporary reality, which Loreto Normanhurst adopted in its attempt to develop a culture of continual reinvention. Such a process required a strong theoretical basis.

An awareness of several areas of knowledge and theory was necessary for both the reinvention of the school and for this study. The literature on a range of aspects of change was relevant. Equally important was the literature related to culture, particularly in understanding the need for embedding change. Finally, the literature on leadership was essential for understanding the work of leading the reinvention. Hence, change, culture and leadership are the major themes of the literature reviewed in the ensuing chapter.

## CHAPTER 3: A REVIEW OF THE LITERATURE

### *Introduction*

The purpose of this study was to develop an understanding of how a school within a particular tradition of education might reinvent itself to meet the changing needs of the students it serves, while remaining true to that tradition. Reviewing the literature relevant to this central focus of the research assists in understanding **why** a school might need to reinvent itself; in what direction, or **whither**, it could change; **how** it could manage to do so; **who** would make it happen; and **what** impacts a reinvention process can have on people in the school. Theories relating to change, to culture and to leadership are fundamental to understanding the process of reinvention of a school and are reviewed in this chapter.

The literature review is in three parts, corresponding to the areas of change, culture and leadership, although all three concepts are connected. Change, caused by both external and internal factors, is a constant challenge to culture. Culture implies stability and predictability, yet a culture too resistant to change will not survive. The task of leadership is to ensure that the culture of an organisation responds appropriately to change. In a reinvention process, leaders have the paradoxical task of developing a continually reinventing culture, so that responding to change becomes the norm.

The literature on 'Change' addressed in this chapter begins with an overview of the changes impacting on 21<sup>st</sup> century schools and the needs of young people, particularly girls, in response to societal changes. These are the reasons why schools need to change. The discussion which follows addresses possible directions in which schools might change, a range of theories of school reform, and theories of change and transition management, and locates this research on the reinvention of a school within this literature. It is argued that the role of values is pivotal in these areas, as well as in understanding the culture of organisations.

Included under the broad heading of 'Culture', is an examination of some of the literature on culture in organisations, especially the reinventing cultures of learning organisations and learning communities. The role played by values in change, particularly in a reinvention process, is addressed, together with discussion of the culture of Catholic, and Mary Ward, schools, and how the values within such cultures impact on why and how they might reinvent themselves. In the last section, 'Leadership', the central role of leadership in major change is discussed, including an overview of theories of leadership in relation to the needs of a reinventing school, particularly in relation to values, and discussion of the role of the principal in such a school.

Overall, the literature in these three areas provided a conceptual framework for the study and for the research question on which it is based, 'How can a school in the Mary Ward tradition reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century?' Prawat and Peterson (1999, p224, as cited in Mitchell 2000, p.54) claim that 'the practice of education is about learning, about knowledge, and about finding oneself in community, but mostly it is about how children make sense of the world'. The world of which 21<sup>st</sup> century young people, including girls, must make sense is changing at a remarkable rate.

## **Change**

### **The complexity of 21<sup>st</sup> century change**

Australia, the country in which this study is situated, is affected by major change. Hugh Mackay (1993), writing of the 'reinvention' of Australia, claims:

Largely by accident, Australians in the last quarter of the 20th century have become a nation of pioneers; some heroically, some reluctantly, some painfully. We have been plunged into a period of unprecedented social, cultural, political, economic and technological change in which the Australian way of life is being radically redefined. (p.6)

At the start of the new millennium, newspapers analysed the changes to Australian society in the past one hundred years (Dale, 2001; Shine, 2001). Many of these changes are paradoxical: Australian society has become wealthier but less egalitarian; young people are physically healthier in some respects, as many childhood diseases have been eradicated, but these have been replaced by other physical problems such as obesity, asthma, anaphylaxis and diabetes. Despite considerable amounts of discretionary income and longer lives, people are less happy and more prone to depression and suicide (Wade, 2002). Prolonged drought and other climate changes affect the land and its people, inducing a demographic shift from rural areas, which, in turn, impacts on other areas of life. Increasing numbers of people are out of work, while others are stressed by overwork (Stanley, Richardson, & Prior, 2005). Similar levels of change also affect other Western countries (Giddens, 2003; Hargreaves, 2003b; Soros, 2002).

Almost every sphere of life in the Western world is changing. On the global level, concerns for the ecological balance of the planet and for sustainability of the earth's resources (Suzuki, 1997), complex bioethical issues, and transnational political, social and economic issues have increasingly direct impacts on people everywhere (Handy, 1995; Soros, 2002). Major social, cultural and demographic changes in employment, family and gender roles, and the decline of social institutions are impacting on the lives of all people in the Western world (Bolden, 2004; Deak, 2003; Giddens, 2003; Handy, 1995, 1996a; Lieberman & Miller,

2004; Needham, 2003; Peters, 1987; Simmons, 2002; Stanley et al., 2005; van Manen, 1991).

Rapid advances in technology and telecommunications (Sheehan, 2006) are characteristic of life in the 21<sup>st</sup> century, the impact of which cannot be overestimated, as Trilling (1999) argues. In such wide-ranging fields as nanotechnology, high-speed manufacturing, and sophisticated biotechnologies, for example, technology has irreversibly changed many areas of life. Information and communication technologies (ICT) have changed the concepts of time, place and community as people connect across the globe at any time of day or night (Margo, 2004; Markson, 2004; Sheehan, 2006) and made limitless information instantly accessible to anyone with a computer.

In summary, earth is changing, life is changing, society is changing, learning is changing, adolescents and their families are changing, and, as Handy (1990) argues, even change itself is changing. Change is no longer incremental, developing along predictable lines; it is hard to find the patterns in the exponential, multi-dimensional change which is occurring on many fronts simultaneously (L. M. Degenhardt, 2001). This is the knowledge era, or the knowledge society, in which 'the source of productivity lies in the technology of knowledge generation, information processing and symbolic communication' (Castells, 1996, p.16), cited in Hargreaves (2003b, p.16).

## **The knowledge era**

As Hargreaves (2003b) explains, the knowledge society has three dimensions.

First, it comprises an expanded scientific, technical and educational sphere...Second, it involves complex ways of processing and circulating knowledge and information in a service-based economy. Third, it entails basic changes in how corporate organizations function so that they enhance continuous innovation in products and services by creating systems, teams, and cultures that maximize the opportunities for mutual, spontaneous learning. (p.17)

The knowledge era is marked by its speed, its innovation and its constant openness to new learning. Yet, while technology has provided many solutions, it has brought with it many vexing moral, ethical and social problems (Bamford, 2004; Mackay, 1999; 2005; Noble, 2002; Postman, 1986; Ramsey, 2000, p. 18-19). Slaughter (1994, p.37) claims that 'the "software" (human priorities, values, thinking patterns) needs to change in order to direct the hardware in useful and sustainable directions'. In the knowledge era of the 21<sup>st</sup> century, human society and work has changed in Western countries. As Trilling (1999, p.5) argues, 'this changes what is needed to prepare for life and work – the main concern of education', and therefore of a reinventing school, which is the focus of this study. What is needed is a new set of basic skills which balance economic imperatives with social needs

(Soros, 2002), which develop nimble, creative yet critical minds as well as empathy, self-awareness and tolerance. These basic skills for the knowledge era, as articulated by a range of individuals, are presented in Table 3.1. This is, or should be, the curriculum for 21<sup>st</sup> century schools.

<b>New Basic Skills for the Knowledge Era</b>			
<ul style="list-style-type: none"> <li>• abstraction, the capacity for discovering patterns and meaning;</li> <li>• systems thinking, to see relationships among phenomena;</li> <li>• experimentation, the ability to find one's own way through continuous learning;</li> <li>• the social skills to collaborate with others.</li> </ul>	<ul style="list-style-type: none"> <li>• self-knowledge and self-mastery;</li> <li>• cognitive and ethical frameworks;</li> <li>• practical competence and artistic skill;</li> <li>• contextual insights (into culture and the global system);</li> <li>• foresight, vision and skills of social innovation;</li> <li>• informed optimism and a sense of empowerment; and</li> <li>• the sense of participating in a greater social whole.</li> </ul>	<ul style="list-style-type: none"> <li>• critical thinking and doing (problem-solving, research, analysis etc.)</li> <li>• creativity (new knowledge creation, design solutions)</li> <li>• collaboration (cooperation, compromise, consensus)</li> <li>• cross-cultural understanding</li> <li>• communication</li> <li>• computing</li> <li>• career and learning self-reliance (managing change, lifelong learning, career redefinition)</li> </ul>	<ul style="list-style-type: none"> <li>• learning to know (broad general education and in-depth study)</li> <li>• learning to do (competences, including flexibility and working in teams)</li> <li>• learning to live together (inter-dependence, cultural respect, managing conflict)</li> <li>• learning to be (leading to autonomy, sound judgement and personal responsibility)</li> </ul>
(Reich, 1992, cited in Fink and Stoll, (1997), p.187).	(Slaughter, 1994)	(Trilling & Hood, 1999)	<i>Learning: the Treasure Within</i> , UNESCO (Delors, 1996)

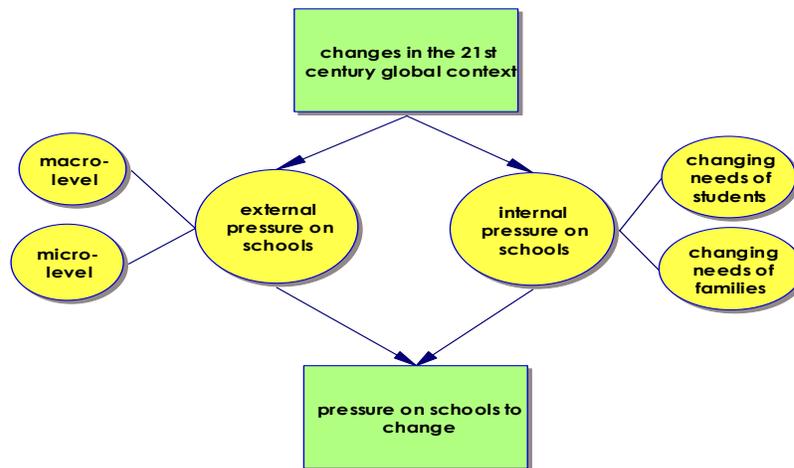
**Table 3.1 New basic skills for the knowledge era**

This level of change inevitably impacts on schools (Fullan, 2001; Hargreaves & Fullan, 1998; Senge, 2002). The impact on schools of the global change discussed above is twofold, and is of immediate relevance to this study in helping to identify and accommodate the changing needs of its students.

The twofold pressures of change on schools emanate from both external and internal catalysts. There are external pressures on schools to fix the many social problems caused by change, and to prepare students to live and work in the knowledge era; and there are internal pressures within schools because their clientele – students and families – have changing needs.

### **External pressures on schools**

Murphy (1997, p.38) writes of the 'ever-widening tear in the social fabric' and Mackay (2005) outlines the social disengagement afflicting 21<sup>st</sup> century societies. Against this chaotic wider context, schools are seen as the means through which social change can be effected (Cannon, 2004; Murphy, 1997). Hence, as Larson (1992, p.23) argues,



**Figure 3.1 Pressures on schools to change**

continuing demands are placed upon schools, such as sex education, environmental awareness, and gun awareness units. In Australia, the list includes bicycle education and road safety, financial literacy, and government-dictated times for physical activity to try to reduce the incidence of obesity among young people (Department of Education, Science and Training (DEST), 2005).

As well as addressing social problems, schools are also expected to fix national economic issues of concern. Marzano (2003) writes that the United States' report, *A Nation at Risk*, (National Commission on Excellence in Education, 1983) stressed the ineffectiveness of U.S. schools and the risk posed to national competitiveness and safety because of this perceived failure of schooling, and led to many governments placing heavy emphasis on their students' relative performances on international tests such as the Third International Mathematics and Science Study (TIMSS) and the OECD Program in International Student Achievement (PISA). Thus, paradoxically, as Murphy and Seashore Louis (1994) observe, schools are blamed for the very problems which they are expected to fix.

Critics have turned their attention to the very institutions and individuals they blame for educational and economic failures and have asked them to turn both schools and the economy around...Parents, policy makers and business seem content to accept the notion that the persons they consider most responsible for educational problems are those in the best position to provide remedies. (p.7)

At the macro-level, schools are thus viewed as both the cause of society's ills and also the solution to them (Riley & Louis, 2000). At the same time, at the micro-level, schools are expected to move beyond the formal academic curriculum to meet the social and psychological needs of students (Larson, 1992, p.23; Murphy & Louis, 1994). In societies which are increasingly fragmented, schools are also seen as and expected to be centres of stability, and communities of meaning and safety, meeting the needs of young people and

their families (Beare, 2001; Sergiovanni, 2000). Parents have increased expectations of schools (Cannon, 2004). Teachers, and especially principals, are expected to be constantly available to parents (Hallinger & Hausman, 1993), and the school is often held accountable for matters which occur outside regular school hours, and were formerly outside the ambit of school responsibility, while also maintaining high academic standards. There is a pressure for perfection (Mackay, 2002), and, when mistakes happen, a tendency to blame and seek legal redress (Cannon, 2004). Overall, therefore, the needs of families, and of young people, in particular, are different from those of earlier generations. There is thus pressure to change emanating from within the school community itself.

## **Internal pressures on schools**

### **The changing needs of young people and their families**

Inter-generational differences are well documented, and terms such as 'baby boomers' and 'Generations X and Y' have now entered our vocabulary (Department of Translation Studies, 1996; DiGirolamo, 2003; Mackay, 1999; Markson, 2004). These generational groups are sharply divided in tastes, interests, aspirations and values. Rather than seek advice and support from their elders, young people tend to 'herd' together, relying on each other, and using technology, particularly mobile phones, to organise themselves (Mackay, 2005; Markson, 2004). Yet many young people are alienated and disillusioned (Carr-Gregg, 2004). The breakdown of liberal values such as social solidarity and political democracy, and the decline of moral responsibility for the community (for example, Department of Education, Science and Training, (DEST), 2004; Grace, 2002a; Houghton, 1999; Popkewitz, 1995; Stanley et al., 2005), leave young people unsupported and vulnerable. Increasing rates of depression and youth suicide attest to this (Mackay, 2005; McGillion, 2003). In fact, Carr-Gregg (2004) argues that the adolescents of 2004 are arguably the most vulnerable generation Australia has ever seen.

Factors contributing to the difficulties facing many young people in Australia, and beyond, making them vulnerable, include poverty (Mackay, 1999; Stanley et al., 2005; Summers, 2003), time-poor parents and/or the lack of family support (Mackay, 2005; Russell, 2005; van Manen, 1991), mixed media messages (Simmons, 2002), new health issues, such as obesity and asthma (Stanley et al., 2005), and higher expectations in terms of material possessions, academic performance and career choice (Abbott-Chapman, 2004; Cahill, Wyn, & Smith, 2004; Carr-Gregg, 2004; Shine, 2001). The mental health of young people is affected by these issues, as well as by the ready availability and lower age of first use of a variety of drugs, as noted in Louisa J. Degenhardt et al.'s (2000) research, and that of others (Lynskey & Hall, 2000; Patton et al., 2002).

Further, the relative lack of ritual and tradition, and the 'spiritual anorexia' referred to by Carr-Gregg (2004) in modern Australian society, means that there is often no strong basis of values on which young people can ground themselves, their outlook and their decisions (Groome, 1998; McGillion, 2003). Social commentators and theologians describe a growing spiritual hunger among the population in general but less allegiance to organised religion (Jones, 1998; McGillion, 2003; O'Murchu, 1995, 1997; Tacey, 2000). For example, although more people than ever in Australia identify themselves as Catholic (D'Orsa & D'Orsa, 1997), less than sixteen per cent of Australian Catholics attended Mass weekly in 2002 (National Church Life Survey, 2002). Within organised religion, there are also significant changes as the number of clergy and religious declines worldwide (Pell, 2005). In this era of diminishing numbers of clergy and falling church attendances, the role of the Catholic school becomes more important in providing young people with a values framework, and possibly a faith commitment, on which to base their lives (Grace, 2002a; Lindsay, 2002; D. McLaughlin, 2000; Sheehan, 2002).

Information and communication technologies (ICT) have changed beyond recognition the context within which young people grow up, compared with a generation ago (D. Campbell, 2000; Eadie, 2001; Friedlander, 2004; Ramsey, 2000; Turbill, 2002). In Australia in 2003, 85 per cent of children under fifteen years old had access to a home computer, 68 per cent of households with children under fifteen years old had access to the internet (Australian Bureau of Statistics, 2004), and 86 per cent of homes with children under fifteen had access to a mobile phone, 'a major tool in the way [young people] organise their lives and an influence on their interpersonal connections' (Stanley et al., 2005, p.142), for good and for ill (Bamford, 2004). ICT also impacts on how young people learn.

Having been accustomed to visual media and technologies all their lives, young people are different learners than their forebears. They have shorter attention spans, learn less sequentially than earlier generations of learners but more on an 'as needed', non-sequential, basis (Bloomer & Hodkinson, 2000; Papert & Freire, late 1980s), and expect to be as much in control of their learning as they are of the remote control on the television set (Boekaerts, 1999; Gee, 2003). Essentially, this is a constructivist approach to learning, within which ICT technologies can be used to good effect (Handal, 2003; McKinnon, Sinclair, & Nolan, 1997; Schutz, 2004; Trilling & Hood, 1999) (see also Chapter 6). This has obvious implications for schools, as the following excerpt from a conversation between Papert and Freire illustrates.

I'm not saying that it's a good idea to change school. I'm saying that it is inconceivable that school as we've known it will continue. And the reason why it's inconceivable is that little glimmer with my grandson who is used to finding knowledge when he wants to and can get it when he needs it, and can get in

touch with other people and teachers, not because they are appointed by the state, but because he can contact them in some network somewhere. These children will not sit quietly in school and listen to a teacher give them predigested knowledge. I think that they will revolt. (Papert & Freire, late 1980s)

The complexity of 21<sup>st</sup> century change, especially the internal and external pressures it places on schools, are central to this study of a school which attempted to deal with this change in ways which met the needs of its students. The needs of 21<sup>st</sup> century young people, already discussed, are common to both boys and girls. Girls also have some specialised needs, and these are important in the context of this study, especially in answering the research sub-question, 'What are the needs of girls at the start of the 21<sup>st</sup> century in the context of the traditions and values of a Mary Ward school?'

### **The needs of girls at the start of the 21st century**

There are many positive aspects in being a young Western woman at the start of the 21<sup>st</sup> century, including greater personal freedom, wider career opportunities, independence and recognition (Pipher, 1996). At the same time, there are major social and emotional issues in the lives of 21<sup>st</sup> century Western middle-class girls which need to be addressed (Jobe, 2002; Pipher, 1996; Simmons, 2002; Videnieks, 2003; Weinman & Haag, 1999). Among these are issues such as bullying, body image and eating disorders, the risk of violence and danger, the pressure to conform and the need for popularity (L. M. Degenhardt, 2003). These issues are explored in popular media (Waters, 2004), as well as in the literature (for example, Senge et al., 2000; Simmons, 2002; Wiseman, 2002).

Social/cultural expectations lead to girls' adoption of adult interests, fashions and behaviours at increasingly earlier ages (Dale, 2002; Funari, 2006; Simmons, 2002). This includes earlier sexual activity (Summers, 2003) and earlier first use of alcohol and/or tobacco (L. J. Degenhardt et al., 2000). Taken together, these issues combine to create a personal vacuum and a 'loss of self' (J. Day, 1996; Pipher, 1996; Sadker & Sadker, 1994, p.77; Sinats et al., 2005). They often lead also to a tendency to perfectionism and the need to be, or appear to be, 'nice' at all costs, and a corresponding suppression and/or denial of negative emotions (Simmons, 2002).

Partly, these issues can be explained by the earlier onset of puberty, which, on average, occurs several years earlier than just a few decades ago (Hinton, 1997; Rowbotham, 2002). The resulting loss of the latency period between childhood and sexual maturity (Pipher, 1996), a time of 'getting comfortable' with oneself, can lead to personal uncertainty and identity issues among girls (Carr-Gregg, 2004). Paradoxically, these constraints on the inner freedom of young women are occurring at a time of unprecedented opportunities

and freedom for women within Western society since the 'gender revolution' of the 1970s (Mackay, 2005). Yet changing gender roles can add to the sense of uncertainty.

Stanley et al. (2005) refer to the way in which gender and family roles, as well as employment, are changing in the wider Australian society, with more women in the workforce and pressure to maintain a balance between work and family life experienced by both men and women, and this is also argued by Russell (2005). The types of jobs available (Epstein, 2004) have changed, however. Technology has made redundant many full-time permanent jobs formerly held by teenage girls (Long, 2005), particularly those requiring little formal education. Thus, among the needs of 21st century girls is that of providing encouragement to complete their education, at least to the end of secondary level, so as to enhance their life choices.

Nevertheless, not all girls will find remaining at school an attractive prospect within the traditional paradigm of schooling, which emphasises transmission of information within a competitive context (de Haas, 2004). Recent studies indicate that girls' learning is predominantly relational and strongly influenced by affective elements (Buckingham, 2005; Deak, 2002; 2003). In order to respond to the needs of girls as learners, schools need to change the traditional paradigm of schooling.

In summary, change of the magnitude presented by the knowledge era of the 21<sup>st</sup> century impacts on schools, as evidenced in this study of a 21<sup>st</sup> century school attempting to reinvent itself. Change in both the external and internal context of schools exerts considerable pressure on schools to change the prevailing paradigm of schooling, which is predominantly attuned to the world of the 19<sup>th</sup> and/or 20<sup>th</sup> centuries, and inadequate to cope with change on the scale being experienced at the start of the 21<sup>st</sup> century (Murphy, 1997, p.38; Noonan, 2002; Senge et al., 2000; M. Wood, 2002).

In times of great change, however, as Mary Ward experienced in the 17<sup>th</sup> century, opportunities hitherto unimagined become possible. What is needed is flexibility and creativity to take advantage of these opportunities and turn them into reality. If schools need to change, as has been argued, whither, to what end, should they change?

### **To what ends should schools change?**

Paradigms and perspectives will determine the ends to which schools need to change. It is ultimately a question of values, and what is understood to be the purpose of education. Popkewitz (1995) notes that all reform is part of a complex power agenda which needs to be articulated and understood: 'As a primary institution of establishing will and purpose in society, schooling ties polity, culture, economy, and the modern state to the cognitive and

motivating patterns of the individual' (p.414). World-wide, two conflicting paradigms prevail. The first is based on an economic-rationalist understanding of the purpose of education, which places more emphasis on the role of 'polity, culture, economy, and the modern state', whereas the second is based on a more liberal understanding of education as development of the human person within community, with a greater emphasis on 'the cognitive and motivating patterns of the individual'.

### **The move towards standardisation**

The first paradigm involves a move towards standardisation and bureaucratic control. It results in increasing pressure to make schools accountable, chiefly through the movement to standardised testing, curriculum and credentialling, as examples from Australia, the United Kingdom, Canada and the United States illustrate (Donnelly, 2004; Kohn, 2002; Mortimore, 1992, p.155; Murphy & Louis, 1994; National Commission on Excellence in Education, 1983; Riley & Louis, 2000; Senge, 2002).

The introduction of Basic Skills Tests, and increasing levels of government monitoring of individual schools' standardised test results, are indicators of this educational direction by Australian governments. 'Strengthened accountability and reporting arrangements which makes funding conditional on education authorities agreeing to report on student outcomes against performance indicators and targets' is numbered among the main changes in the States Grants (Primary and Secondary Education Assistance) Bill 2000 compared with that of 1996.

While there are dangers in schools controlling the educational agenda without sufficient accountability (for example, Marzano, 2003; Reynolds & Packer, 1992; Riley, 1998), a focus on testing alone will not solve the problem of children with poor educational experiences and outcomes (Kohn, 2005). As Senge (2000, p.359-60) explains,

state standards have nothing to say about the fundamental reasons why performance in some schools might be worse than others, or how to close the gap in any sustainable way...

Students who have difficulty with the tests, for whatever reason, find fewer channels in which to excel. They see no reason to try, and both the failure and the dropout rates increase...This situation leads to lower overall skill levels, which leads to lower overall performance.

Three concerns emanate from this situation. First, as Senge illustrates, 'more of the same', rather than a systemic solution, can lead to progressively worse outcomes. Ideally, increased accountability should promote rather than limit empowerment (Starratt, 2002). Second, schools are not the only variable in the problems relating to contemporary society. Focusing solely on schools' performance 'fails to take into account the larger societal and economic conditions in which schooling is embedded. [W]hat happens in the school and

the classroom is deeply affected by what happens in the streets and in the governments of the day and in the homes of the students' (Mitchell & Sackney, 2000, p.128).

The third concern is that imposed accountability measures may stifle the creativity and ability of schools to improve their educational provision and meet the needs of their communities. Chubb and Moe (1990), (cited in (Marzano, 2003, p.8-9), demonstrate that centralised control over schools can be 'particularly debilitating'. As argued earlier, one of the many implications of present societal change is to bring 'an increased burden of care to the door of the school' (Cahill et al., 2004). The authors of a major research project on Victorian (Australia) Catholic schools maintain that the solution lies in re-thinking the role of schools so that they fill an augmented role in society through a holistic approach to education (Cahill et al., 2004).

Many others endorse such a view of education (Corner, 2000; Gleeson, 1994; Hatcher, 2005; Patton, Bond, Butler, & Glover, 2003; The SOLR Project, 2003) and also Gatto (1992) in whose view education

...should make you a unique individual, not a conformist; it should furnish you with an original spirit with which to tackle the big challenges; it should allow you to find values which will be your road map through life; it should make you spiritually rich, a person who loves whatever you are doing, wherever you are, whomever you are with; it should teach you what is important, how to live and how to die. (p.75)

This is quite a different understanding of the purpose of education from that emanating from an economic-rationalist paradigm. It focuses on the whole child, within his/her context, but also has a transcendent, spiritual quality, based on strong values. Such a paradigm is therefore more in keeping with a Catholic and Mary Ward perspective, and provides insights into the research sub-question 'Were Mary Ward's values retained in the reinvention?'.

### **A holistic approach to education**

Within Australia, 'The Adelaide Declaration on National Goals for Schooling in the Twenty-first Century' (Ministerial Council on Education, 1999) promotes holistic aims for education in Australian schools:

Australia's future depends upon each citizen having the necessary knowledge, understanding, skills and values for a productive and rewarding life in an educated, just and open society. High quality schooling is central to achieving this vision.

This statement of national goals for schooling provides broad directions to guide schools and education authorities in securing these outcomes for students. It acknowledges the capacity of all young people to learn, and

the role of schooling in developing that capacity. It also acknowledges the role of parents as the first educators of their children and the central role of teachers in the learning process.

Schooling provides a foundation for young Australians' intellectual, physical, social, moral, spiritual and aesthetic development. By providing a supportive and nurturing environment, schooling contributes to the development of students' sense of self-worth, enthusiasm for learning and optimism for the future...[and] a socially cohesive and culturally rich society.

From this federal basis, Australian states and territories have developed their own educational goals, which include emotional, social and spiritual elements, particularly the need for the nurturing of values. Interestingly, Australian governments seem to be working from conflicting paradigms. As discussed earlier, there are increasing government moves toward standardised and high stakes testing, and eschewing of perceived 'soft options', which focus on the needs of students as people and as learners (Donnelly, 2004), yet government educational goals promote a holistic perspective, as do other international organisations.

The United Nations Education Scientific and Cultural Organisation (UNESCO) document *Learning: the Treasure Within* is described as 'a powerful plea for viewing education in the broader context of its interaction with society' (Delors, 1996). Further, Kelly (2004) notes a recent change in UK government rhetoric, which suggests that accountability measures might be moving towards describing improvement from a different perspective. Instead of a narrow focus on external stakeholder outcomes, which fail to capture the essence of what it was to be (or what it takes to become) a successful improving school, the new rhetoric of accountability focuses on internal outcomes, particularly the development of intellectual capital within the school. In other words, the context and particular situation of the school would be taken into consideration in measures of accountability.

This is a significant shift. It suggests that, in the trend towards more holistic education, a national, 'top-down' perspective might also appreciate and emphasise the needs and achievements of the individual student and school – a 'bottom-up' approach. Reinventing schools adopt a 'bottom-up' approach when they attempt to meet the holistic needs of their individual students as well as those of the broader community. Such schools also take heed of the external context within which they operate, and seek advice and support from theory and from external experts. Therefore, an 'inside-out' approach (Covey, 1995; Larson, 1992) would be a better description of a reinventing school.

This study is based on a holistic paradigm of education, which places the development and growth of the individual, within a community context, as the highest value and ultimate

purpose of education. As argued in Chapter 1, it is schools themselves which are in the best position to bring about effective educational change within this paradigm, through constantly reflecting on and learning from their experience and the context in which they operate, engaging with the current needs of young people, and discerning the future context which those young people will actively create (Beare, 2001; Beare et al., 1989; Handy & Aitken, 1986; Holly, 1990; Reynolds & Packer, 1992; Senge et al., 2000).

In this way, 21<sup>st</sup> schools can balance the academic and social objectives of schooling, and find new ways to manage the multiplicity of roles facing them. More is now known about how learning occurs (Argyris, 1992a; Cromwell, 1998; Goleman, 1996; Organization for Economic Cooperation and Development, 2004; Starratt, 1996). Schools, and the professional educators within them, can and need to express more explicitly the processes of learning (Hinton, 1997; Ramsey, 2000) and publicly articulate their understanding of the purposes and paradigms of education in order to influence the debate on education, and win community respect for their professional authority (L. M. Degenhardt, 2001).

Awareness and adoption of a paradigm of education is essential in order to know to what end schools need to change. 'Where are you going?' needs to be asked before 'how do you get there?'

### **How can reinvention occur within a school?**

The question of how to bring about change is the next step in the journey of a reinventing school. Such a question is informed, once again, by values as well as by the literature on models of school change, change theory and how organisations work (Handy, 1996a; Handy & Aitken, 1986; Schein, 1992; Wheatley, 1992).

#### **Choosing a paradigm for school reinvention**

How a school approaches the process of reinvention will depend on a values-based decision about paradigms of change. As discussed in Chapter 1, school reform can be premised on a 'Newtonian physics' mindset (Wheatley, 1992), where a school is understood as a 'formal, reified, organizational structure' (Reynolds & Packer, 1992, p.179), and a 'cause and effect' approach to change prevails.

Alternatively, a biological, living systems view of organisations, is based on the understanding that 'the fundamental nature of reality is relationships, not things' (Senge et al., 2000, p.52). Within this paradigm, a school is seen as a living organism. Therefore, even though reinvention is revolutionary, it can also be seen as a natural evolutionary process – a self-evolutionary process – because 'a living system has the capacity to create itself' (Senge et al., 2000, p.53). In such an approach, the 'lifeworld' of the school, based

on its unique values and purposes, dictates the shape of the 'systemsworld' of structures and plans (Sergiovanni, 2000). Attitudes, perceptions and relationships are central (Reynolds & Packer, 1992).

It is on this latter paradigm of reinvention process, which is in keeping with the Catholic and Mary Ward ethos of emphasis on relationships and valuing the dignity of the person, that this research is based. It is thus through the lens of a living systems paradigm that models of school reform and theories of change were viewed in this study. Knowledge of these paradigms, models and theories helped to address several research sub-questions in this study:

2. What was the reinvention process used within the school to improve the school's response to the needs of girls at the start of the 21<sup>st</sup> century context within the Mary Ward context?
3. What factors assisted the reinvention process?
4. What factors hindered the reinvention process?
5. How was the reinvention process perceived by key stakeholders?

Within the literature, there are several schools of thought concerning how schools should improve and towards what end they should improve.

## **Models of school change**

The school effectiveness, school improvement, school restructuring, and school transformation and reculturing approaches each offered insights for this study.

### **School effectiveness**

School effectiveness research began with a focus on the ineffective school (Sammons, 1999, p.ix; Scott, 2000). The British OFSTED review of school effectiveness research (Sammons, Hillman, & Mortimore, 1995, p.8) produced a list of eleven key characteristics of effective schools:

1. Professional leadership;
2. Shared vision and goals;
3. A learning environment;
4. Concentration on teaching and learning;
5. Purposeful teaching;
6. High expectations;
7. Positive reinforcement;
8. Monitoring progress;
9. Pupil rights and responsibilities;
10. Home-school partnership; and
11. School as a learning organisation.

The school effectiveness movement is a 'top-down' effort to improve students' academic outcomes. Since this study focused on a reinvention process which extended beyond

academic outcomes to include the holistic growth of the person in a wide range of areas, the school effectiveness approach had limited application. Nevertheless, the key characteristics outlined above provide useful goals for reinventing schools (Bollen, 1996, p.1, 3), and an evaluation checklist for practitioners and researchers in working to reform schools (Riley, 2001a), including the school in this study. Murphy's (1992) argument was of particular value:

Perhaps the most powerful and enduring lesson from all the research on effective schools is that the better schools are more tightly linked – structurally, symbolically and culturally – than the less effective ones. They operate more as an organic whole and less as a loose collection of disparate sub-systems. (p.168)

The school effectiveness approach offers few suggestions on how schools are to achieve the desired goal of effectiveness and so is best referred to as a movement rather than a model. It also gives rise to questions about the definition of effectiveness. There is no consensus on what constitutes an effective school (Reid, Hopkins, & Holly, 1987), cited in Sammons (1995, p.3), and any definition is inherently value-laden.

Matheson and Matheson (2000, p.6) argue that

the meaning of the term 'effective school' will depend on the discourse within which it is measured: Within the discourse of the market an effective school may be one which scores well in external examinations... It may achieve this high score partly through divesting itself of those pupils whose performance risks lowering the average examination score. Such a school would hardly be effective in the discourse of inclusion. (p.6)

Such a school would not be considered effective within the discourse of Christian ethos either, as Grace argues (1995), or within its subsets, the Catholic and Mary Ward ethos. Within this overall tradition, an effective school would be defined as meeting the needs of the whole person through helping him/her to develop into a whole, faith-filled and compassionate human being, and in doing so, not just achieving academic success. School effectiveness research, therefore, with its narrow focus on measurable variables, its focus on student academic outcomes as the single measure of an effective school; and its reference to 'good' and 'bad' schools as if that were unproblematic (Scott, 2000, p.64; Stoll & Reynolds, 1997, p.17), offers limited usefulness to a reinventing school within the Catholic and Mary Ward tradition. The school improvement model is more helpful to such a school.

### **School improvement**

Whereas school effectiveness research provides a 'vision of a more desirable place for schools to be', the central concern of school improvement is 'how best to make the journey to that place' (Hillman and Stoll, (1994, p.2). The end point of that journey, the goals of

schooling and ultimate purpose of education, is left to individual schools to define within their own contexts. The school improvement model thus takes a 'bottom-up' approach, in which improvement attempts are owned by those within schools (Stoll & Reynolds, 1997, p.16). Because of the way in which school community members and practitioner knowledge is respected, the school improvement model is more aligned to a reinventing school in the Catholic and Mary Ward tradition. Further, the orientation of school improvement is dynamic, focusing on change over time (Stoll & Reynolds, 1997, p.17), and therefore is useful in a continually reinventing approach to school reform, the focus of this study.

On the other hand, there were some drawbacks to the school improvement model, from the perspective of this study. First, its failure to embrace external research, and its over-emphasis on intuitive practitioner knowledge, mean that school reform would have no enduring theoretical underpinning. Second, it is inapplicable to schools where teachers are not motivated, or do not have the necessary skills, to engage in school improvement (Reynolds & Packer, 1992, p.182). In fact, Sergiovanni (1996, p.2-3) citing Fullan (1991; 1994), argues that neither the first wave of reform (with its top-down strategies) nor the second wave of reform (with its bottom-up strategies) have worked well.

Nevertheless, this study of a reinvention process draws from the positive insights offered by both the school effectiveness and school improvement approaches to school reform. Both approaches work within a given understanding of how a school operates, but the school restructuring approach questions such a given understanding.

### **School restructuring**

'Restructuring rests on the assumption that changes in school organisation and the workplace conditions for teachers will result in changes in teachers' and students' roles' and improved learning opportunities for students (Peterson, McCarthy, & Elmore, 1997, p.126). In other words, changing the way that schools are organised will change teaching and improve student learning. A school restructuring model is at odds with a living system paradigm of school reform, in which relationships, attitudes and values are paramount. It also fails to link structural changes with underlying purposes (Peterson et al., 1997). 'It is possible to change on the surface by endorsing goals, using specific materials and even imitating the behaviour without specifically understanding the principles and rationale for change' (Fullan, 1991, p.40). This study, therefore, avoids the school restructuring approach. The success of a school community in creating a dynamic culture of individual and community growth, learning and leadership, which was a key focus of this study, will

depend, to a large extent, on how well the reinvention process, and any changes in structure which emanate from this, are linked to meaning, direction and purpose.

An important distinction is made by Fullan (1998a, p.42), who suggests that 're-culturing' leading to 'restructuring' is more effective than restructuring in the hope of reculturing. 'It is much more powerful when teachers and administrators begin working in new ways only to discover that school structures are ill-fitted to the new orientations and must be altered' (Fullan, 1998a, p.68). Thus, while the two interact, 'changing school structures...are less the means by which school cultures change, and more the *results* of changes in the school culture' (Sergiovanni, 1996, p.2, author's italics). Changing structures then becomes a necessary scaffold to support cultural changes, in order to avoid repeating the mistakes of the past (Isaacson & Bamberg, 1992).

Banathy (1988, as cited in Holly 1990, p.196) argues that school restructuring does not go far enough: 'Current reforms', he claims, 'try to improve one or another part of the educational system without reference to the total system to which it belongs...What is needed is a broad sweep of comprehensive transformation: a metamorphosis... From the cocoon a butterfly should emerge.' The breadth and holistic nature of the school transformation or reculturing approach to school reform, and its efforts to connect with systems, processes and purposes which transcend the school itself, proved the most useful for this study of a reinvention process.

### **School transformation and reculturing**

This approach to change in schools is based on the premise that the whole model and purpose of schooling needs to be reviewed, reconceptualised and changed. It aims at 'reinventing' the whole educational enterprise (Allen et al., 2000; Beare et al., 1989; Handy, 1990; Little, 1995; Meier, 1992). School transformation literature asks quite different questions: how should schools be? what should they aim to do? There is a move from a 'doing things right' approach to 'doing the right things'. School transformation is about double-loop learning (Argyris, 1992a), second order change (Cuban, 1988; Holly, 1990) and voluntary change (Larson, 1992), all of which are discussed in the next section of this chapter. Rather than 'top-down' or 'bottom-up', it happens from the inside-out (Mitchell & Sackney, 2000). Some researchers refer to school change of this order as 'third wave' (Banathy, 1988, as cited in Holly 1990, p.195; Corner, 2000; Reynolds & Stoll, 1996).

A school transformation approach would have schools move beyond the formal academic curriculum to meet the social and psychological needs of students (Larson, 1992, p.23; Murphy & Louis, 1994), and therefore reflects the approach to the reinvention process on which this study is based. Reculturing is one of the ways to achieve this transformation.

When people alter how they think, reframing their perceptions (Bolman & Deal, 1997) and changing what they do, major change is effected.

The importance of changing the culture of schools is emphasised by Fullan (1997b, p.3), who argues that schools need to make conscious and constructive connections with the wider world beyond them in order to maintain relevance for students and their parents. The argument for involvement in and accountability to the wider society is taken up by others (for example, Riley, 1998; Starratt, 1996, p.70-71) and also Holly (1990, p.196ff.). Reinvention through reculturing is necessary to bring about the necessary 'dramatic alteration in the image we have of schooling in society and of the "co-evolutionary" relationship between a school and its society' (Holly, 1990, p.196). Each image or design should be different, the result of each school and its community building its own model for the future. In this local-level process, teachers provide the necessary expertise, while the voice of the community – students, parents, local business people and the community at large – should also be heard. This was an essential part of the reinvention process.

The 'dramatic alteration' in the image of schooling in society can be assisted by powerful visions, which act like magnets pulling us into the 21<sup>st</sup> century, as Holly (1990, p.196) argues. Beare (2001), Starratt (1995; 1996; 2004b), and Sergiovanni (1996; 2000) offer examples of such magnets into the 21<sup>st</sup> century, and they provide a strong rationale for school transformation. Sergiovanni (2000), for example, refers to the role of deep change and the power of localism in creating and maintaining schools with character, where values and purpose inform structures and systems. The emphasis in such schools is holistic, the focus on the whole child, the whole school and the whole society. Hence the model of school change most relevant for this research was that of school transformation and reculturing. This model, and the reinvention process for this study, is supported by general theories of change, most of which address the question of reculturing as well as sub-questions 3, 4, 5 and 6.

## **Theories of change**

Five theories of change informed this study, the first of which is that of Schein (1992).

### **Schein's theory of change**

Schein argues that people try to find patterns and establish routines so that much of what is done becomes automatic and therefore reduces stress. Human organisations attempt to maintain equilibrium and to 'organise the mass of environmental stimuli, to make sense of them, and to provide, thereby, a sense of predictability and meaning to the individual' (Schein, 1992, p.298). In the face of a constantly changing internal and external

environment, such as that discussed earlier, systems work to maintain stability, to survive and to grow. For a school community to move beyond this natural conserving tendency, and be motivated to change, three conditions have to be met (Schein, 1992):

1. people have to be convinced of the need for change, and therefore presented with data which challenge the *status quo* (see also Corner, 2000);
2. because these disconfirming data can cause anxiety and/or guilt, they need to be connected to goals and values important to the organisation (L.M. Degenhardt, 2001);
3. there needs to be enough psychological safety for members to see the possibility of solving the problem in acceptable ways, and thereby avoid denial, defensive reactions or 'strategic myopia' (Lorsch, 1985).

Schein's (1992), three-step theory of change, which requires 'unfreezing' (creating the motivation to change; 'cognitive restructuring' (changing patterns of thinking and of behaviour); and 'refreezing' (reinforcing and institutionalising the changes in the culture), provides a framework and a language for change, particularly for those who lead change. Argyris's (1992a) theory of change is related in that it is based on learning.

### **Argyris' theory of change**

In the literature, the terms 'learning' and 'change' are often used synonymously (Argyris, 1992a; Senge, 2002). Argyris' concept of 'double-loop learning', where errors are corrected by first examining and altering the governing variables, provided further insights into change processes which could be applied to this reinvention process. Argyris identified four gaps in Schein's model of change when applied to double-loop learning, namely:

1. the assumption that individuals have the skills to learn the new behaviour;
2. people may be unaware, or choose to remain unaware, of their lack in skills which they value;
3. this unawareness is related to suppression, especially of feelings;
4. the assumption that one can understand people's values by asking them to state them, which ignores the gap between espoused values and the theory-in-use which determines people's actions.

The insights provided by Argyris were used in this study, especially those related to espoused values and theories-in-use, and the potential gap between the two. As a result, all key stakeholders were given opportunities to engage in reflection and discussion about values, and their expression, and about personal reactions to change. In addition, opportunities for professional learning related to both change processes and targeted skills were made available to all involved.

Professional learning plays a major role in school change. The importance of focused professional development, 'contextualised and purposefully led' (Kirkham, 2005, p.151), to bring about change and to achieve a learning school is stressed also by others (Darling-Hammond, Cobb, & Bullmaster, 1998; Darling-Hammond & McLaughlin, 1995). Much of the literature of school transformation and reculturing also places emphasis on the role of the teacher and teacher learning (Darling-Hammond et al., 1998; Louis & Miles, 1990; Riley, 2000) and on the need for school communities to engage in their own search for how to transform their school. That search can result in quite different types of change, as Cuban's (1988) theory explains.

### **Cuban's theory of change**

Cuban's (1988) theory of change differentiates between first order change and second order change. The former is linear and, because it does not result in disjunctive change, is therefore less threatening. Second order change, by comparison, does result in disjunctive change – people are asked to do something that has not been done before. Although it was more challenging, it was an openness to second order change which would be necessary to create the culture of continuous improvement sought in the reinvention process on which this study is based (Cuban, 1988; Mitchell & Sackney, 2000). Larson (1992), on the other hand, identifies three forms of change.

### **Larson's theory of change**

Larson's model distinguishes between change that 'just happens' (osmotic change); change that occurs in response to laws and regulations (policy change); and change which emerges from within an organisation (voluntary change). This typology was useful in this research in that it helped differentiate the many change forces impacting on the school. Schools, like other organisations, always have to deal with osmotic change – outbreaks of illness, staff retiring or leaving, new developments in technology, the impacts of national and global events.

Schools, including the case study school, also have to deal with policy change (Larson, 1992) – in New South Wales, for example, a new format and new syllabuses for the Higher School Certificate, new requirements for all teachers to have first aid training, new legislation on Child Protection, and Occupational Health and Safety issues. At the macro-level, schools are affected by the concern of external agencies, system administrators and governments to develop the citizens of the future and ensure their countries' future health and competitiveness in world stakes (Barber, 2003; Beare, 2001; Earl & Fullan, 2003; Gartrell, 2004; Loughnane, 2004; Ministerial Council on Education, 1999; Retallick & Fink, 2002) – all of which create pressure for change in schools (Larson, 1992).

But not all schools engage in voluntary change (Larson, 1992), deliberately initiated by the school community, in order to be more effective in meeting new needs. Teachers' reclaiming their own sense of power, purpose and professionalism (L. M. Degenhardt, 2001; Fullan, 1997b) provides one such lever for change. Voluntary change is at the basis of reinvention processes within this study. The fifth, and final, theory of change used in this study would help people in the school community to see why change was necessary in an already successful school.

### Handy's 'sigmoid curve' theory of change

Handy's sigmoid curve (Handy, 1990; 1995), as presented in Figure 3.2, provides a clear, pictorial outline of growth and decline in organisations.

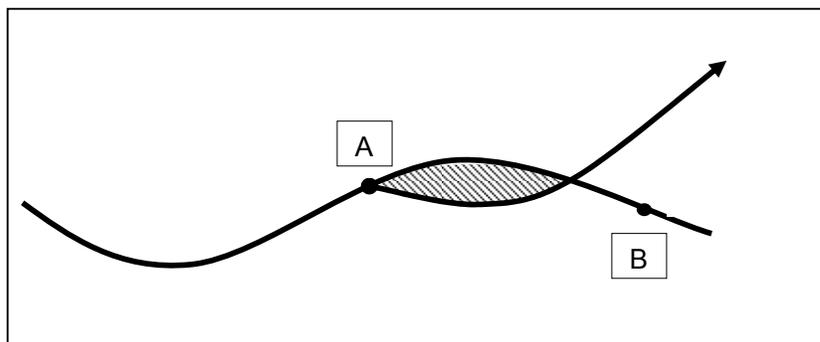


Figure 3.2 Handy's sigmoid curve

Through this diagram, Handy demonstrates that all relationships and organisations are part of ongoing patterns of growth and decline. The challenge of reinvention is to interrupt the inevitable trajectory into decline ('B') at point 'A', right when the organisation is thriving and the need for change seems unlikely, by beginning another sigmoid curve. The sigmoid curve would be a valuable tool in this study to help people see the need for change when the school was perceived by so many as highly successful (Corner, 2000; Schein, 1992). Such a 'picture' of change forms part of Bridges' (1995) theory of transition management. It helps people to cope with change if they can picture how it looks. It also helps to address issues related to the research sub-question 'How was the reinvention process experienced by key stakeholders?'

### Transition management

Bridges' (1995) concept of transition, the psychological process that people go through to come to terms with change, was useful for understanding people's needs in a time of change and helping to address the research sub-questions, 'How was the reinvention process experienced by key stakeholders?' and 'What factors assisted the reinvention process?'

Bridges (1995) describes the transition process as entailing three steps: letting go of the old reality, and grieving for what has been lost; a neutral zone, 'an inner sorting process in which old and no longer appropriate habits are discarded and newly appropriate patterns of thought and action are developed' (p.46); and finally, the new beginning. In this study of a reinvention process, the theory of transition management was valuable, as people had to let go of comfortable old habits, methods and mindsets, engage in the uncomfortable process of cognitive restructuring (Schein, 1992), when nothing would seem clear or concrete, and, together, make a new beginning, developing new ways of meeting the needs of 21<sup>st</sup> century girls in ways compatible with the Mary Ward tradition. Especially, its value would lie in its being able to be shared with the school community as a way of making sense of how they feel about the reinvention processes.

Psychological safety (Schein, 1992) is needed for school community members to cope with and to manage the major change involved in reinvention, since staff resistance to change and teacher negativity, in particular, is well documented (Corner, 2000; Reynolds & Packer, 1992; Sizer, 1992). Transition management is a crucial aspect of change. From a pragmatic perspective, change will not be effected or effective unless the needs of people are met. From a values perspective, an organisation which focuses on the well-being of its people, such as a school in the Mary Ward tradition, seeks to support its members as an end in itself. For these reasons, issues of transition and transition management would be pivotal in understanding the psychological processes that participants in a reinvention process go through, as the culture of the school changed in response to internal and external pressures.

Stoll (1998) claims that school culture is one of the most complex and important concepts in education, yet one of the most neglected in relation to school reform. What follows, therefore, is an overview of the concept of culture, and discussion of the continually reinventing cultures of learning organisations and communities, and the culture of schools, especially Catholic schools, all of which were central to the framework for this study and in answering the research question of how a 21<sup>st</sup> century school in the Mary Ward tradition might reinvent itself to meet the needs of its students. These concepts concerning culture addressed, in particular, sub-questions of this study related to the vision and values of Mary Ward, how key stakeholders experienced the reinvention process, and factors which either assisted or hindered the reinvention process.

# **Culture**

## **Theory of Culture**

As an ethnographic case study, within the tradition of autoethnography, this study was intensely concerned with people, and therefore with culture. Schein (1992, p.12) defines culture as 'a pattern of shared basic assumptions that a group has learned in response to its problems of external adaptation and internal integration'. Although often these assumptions operate unconsciously, they are 'taught to new members as the correct way to perceive, think and feel in relation to those problems' (Schein, 1992, p.12).

According to Schein, organisational culture consists of artefacts, espoused values and deep underlying assumptions. In a well-functioning organisational culture, all three elements are aligned and consistent: goals are agreed and harmony usually exists within the organisation. In a time of major change, however, cultural upheaval occurs, as the organisation confronts the disconfirming data which is the prelude to change. Change will be effected only if this destabilisation and 'unfreezing' of mindsets and of the culture occurs (Schein, 1992, p.300 ff). The work of Marzano et al. (2005, p.73) confirms this, illustrating that 'Culture has the strongest negative relationship with second-order change'. The task of reinvention was thus likely to be very challenging.

Schein (1992) further argues that a large organisation will have many sub-cultures, some of which will be in conflict with each other. He explains (1996) that many organisations fail to learn, not because of resistance to change, human nature, or poor leadership, but because of the lack of communication among three cultures: the culture of operators, based on human interaction; the engineering culture, based on the technology and design elements of the organisation; and the executive culture, which revolves around financial health, boards and investors. 'When organizations attempt to redesign or reinvent themselves...the cultures collide and failure occurs' (Schein, 1996, p.14-15). Yet despite this conflict, these same organisations can have common assumptions that come into play when a crisis occurs or when a common enemy is found. 'Enough mutual understanding must be created among the cultures to evolve solutions that all groups can commit to' (Schein, 1996, p.14-15). The role of values and vision in the reinvention process, therefore, would be pivotal in aligning the cultures within the school.

The challenge for a reinventing school is to align its range of cultures - the cultures of the Leadership Team; a range of cultures among the staff, the parent body and the student body; the culture of the governing body and the owners – while recognising that, at the same time, the overall school culture will be destabilised in the process of reinvention. On the one hand, 'if a group is to accomplish tasks that enable it to adapt to its external

environment, it must be able to develop and maintain a set of internal relationships among its members' (Schein, 1992, p.70) as well as 'develop a shared concept of its ultimate survival problem, from which it usually derives its most basic sense of core mission, primary tasks, or reason to be' (Schein, 1992, p.53). On the other hand, those working for major change within a school have to create or to demonstrate to members an inconsistency between the values, artefacts and assumptions of the school as it exists, in order that the school might reinvent itself. This can create difficulties, and proved to be a key understanding within this study of a reinvention process, and also contributed to answering the sub-question: 'What factors assisted the reinvention process?' and 'What factors hindered the reinvention process?', as did the insights which follow.

The concept of culture helps to explain conflict among groups of people within organisations. Balkanisation of opposing views (Hargreaves & Fullan, 1998) needs to be avoided, as diametrically opposed core beliefs mean that no proper argument or dialogue is possible, only an exchange of slogans and abuse (Handy, 1996b, p.161). The challenge for a reinventing school is to keep focus on an overarching vision inspiring enough for all community members to support. In the approach to reinvention, which was the basis of this research, such an overarching vision could be found in the vision and values of Mary Ward.

An understanding of culture can also explain the rationality of certain actions within a school community which would otherwise seem irrational. Novak and Fine (1996) provide an example of culture clash between the culture of workers, who believed their actions were consistent with company values, and the culture which management wished to inculcate in its employees. The apparent paradox is explained by Van Maanen's theory (1989, cited in Novak and Fine 1996, p.16) of a two wave process of socialisation: 'first in indoctrination of organizational values and second in immediate work-group values, which are not necessarily consistent'. An alternative explanation is offered by Argyris (1992a), who challenges the assumption that it is possible to understand people's values by asking them to state their values. There is a gap between what people say are their values, and what their actions reveal their values to be: Argyris refers to this situation as the gap between espoused values and theory-in-use, as explained earlier in this chapter.

These insights from the literature on culture were useful for this study, both in enhancing the understanding of the school as organisation and in increasing the researcher/principal's awareness of a range of factors: the potential gap between espoused values and theory-in-use, the existence of a range of sub-cultures, the need for a unifying inspirational vision and the likelihood of conflict as part of the cultural upheaval that reinvention incurs.

Schein (1992) and Argyris (1992a) explore how the reculturing necessary to respond to these internal pressures, as well as those external to the school, might occur. They link organisational culture with the concept of learning, arguing that in a world of turbulent change, organisations have to adapt and learn ever faster, and this calls for a learning culture that functions as a 'perpetual learning system' (Schein, 1992, p.372), a continually reinventing culture.

### **Continually reinventing cultures: learning organisations and learning communities**

Schein (1992) identifies the paradox within the concept of a learning culture: culture is by definition a stabilising, conservative process, whereas a *learning* culture attempts to institutionalise and stabilise innovation and change (Schein, 1992, p.363). This is what is understood by a learning organisation or a learning community. The paradox inherent in the concept of a learning organisation is at the essence of the challenge for a reinventing school. The framework for this study needed to anticipate the struggle to maintain sufficient stability and equilibrium for its people to function on a daily basis, without excessive psychological and organisational stress, with the need to be constantly destabilised in acknowledging and meeting new needs. This constant destabilisation would need to become the new stability. This would be central to addressing both the research question of how the school could reinvent itself to meet the emerging needs of its students and, specifically, sub-question 2, which relates to the nature of the process used to achieve the aim of continual reinvention.

Senge's (1990; 2000) work, which focused on expanding capacities and competencies, provided some guidance on how the school could manage the paradox. He presents five competencies or 'disciplines' that the school would need to develop if it were to thrive on change and achieve its purposes: personal mastery; shared vision; mental models; team learning; and systems thinking – learning to understand interdependency and change, based on theory about the behaviour of feedback and complexity. Senge's model groups together several concepts that were central to this study. The importance of developing personal mastery and team learning, or personal, interpersonal and organisational capacity (Mitchell & Sackney, 2000), rather than a deficit model approach, would be central in professional development provisions; the concept of mental models refers to the importance of articulating, and being able to challenge, ingrained assumptions and paradigms, as discussed earlier; and the importance of shared vision and values has also already been discussed. Yet it was the concept of systems thinking, similar to the concepts of double-loop learning (Argyris, 1992a) or second-order change (Cuban, 1988), but emphasising the inter-connectedness of factors and the corresponding need to see any

individual factor as part of a whole system, which was particularly useful. 'Systems thinking' was helpful when the prevailing paradigm of the study saw a school as an organic entity, a 'colligative, living system' (Beare, 2001, p.110).

Leithwood et al.'s (1998) definition of a learning organisation was also useful in providing a framework for this study of a reinventing school in its emphasis on constant evaluation. They refer to the need for 'a collective commitment to regularly weighing the value of [common] purposes, modifying them when that makes sense, and continuously developing more effective and efficient ways of accomplishing those purposes' (p.68-9).

Writers on learning organisations are primarily concerned with effectiveness: how the organisation is best able to pursue its preferred direction through being adaptive. For example, Argyris (1992a, p.1) refers to the 'realization of human potential for learning in the service of organizational purposes.' The notion of a learning community, by contrast, is based on the belief that the learning and growth of the people within it is the primary aim of an organisation.

Mitchell and Sackney (2000, p.6) explain the key difference between learning organisations and learning communities as lying in the definition of ends and means:

In a learning organization, the ends of importance are organizational growth, productivity, efficiency, and effectiveness. The means are the people and the learning that they do in support of organizational goals. The goals are established by the gatekeepers of the organization, and learning is a tool to support organizational processes and efficiencies... By contrast, in a learning community, the ends of importance are the growth and development of the people. The means are the ways in which community members work and learn together. The goals are set through intensive and ongoing negotiation and discourse within the community, and learning is a natural process that is grounded in the realities and perplexities of human lives and that penetrates every aspect of the community experience.

For a school in the Catholic and Mary Ward tradition, in which respect for the dignity of the human person is an inherent value (Flannery, 1996; Office for Social Justice, no date), such a distinction was important, and helped orient the framework for this study of a reinventing school away from the concept of learning organisation and toward that of learning community. In developing their model of a learning community, Mitchell and Sackney construct 'a cohesive framework that acknowledges the value of both the individual and the community' (Mitchell & Sackney, 2000, p.xii). The building of community is seen, not as static or transactional, but as 'an organic, evolutionary process that entails the deep involvement of each individual in pursuit of ways and means to promote sustaining and sustainable processes, structures, tasks and commitments' (Mitchell & Sackney, 2000, p.xii).

Senge (1990, p.3) expresses similar views: 'people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free and where people are continually learning to grow together'. Such a description helped to reinforce and refine the people-centred approach to reinvention taken in this study, where

People [are] called upon to act with greater autonomy, to draw their own conclusions, to lead as well as follow, to question difficult issues in a safe manner; and to risk failure so that they may build capabilities for future successes. These are the skills that learning organizations and learning communities demand. (Senge et al., 2000, p.7)

There is a sense of mystery in this concept of a learning community. As Wheatley (1992 p.7) maintains, 'There are no recipes or formulae, no checklists or advice that describe "reality". There is only what we create through our engagement with others and with events.' Unpredictability and complexity are acknowledged as part of the equation. In some ways this is a feminine way of knowing and responding (Hayes & Flannery, 2000; Popcorn & Marigold, 2000), which places equal emphasis on affective processes, the 'heart' of the learning community, and on cognitive processes, the 'mind' of the learning community, as does Mitchell and Sackney's (2000, p.57) model of a learning community.

This study of the reinvention of a Mary Ward school is based on the understanding that such an equal emphasis on cognitive and affective processes is the most useful in a reinvention. There is a need for structures, clear planning and direction, together with acknowledgement of emotional issues, including the hope, weariness and fear associated with reinvention. Rather than adopting a single model of a learning community from the literature, however, this research drew from elements of several in framing a reinvention process as the creation of a dynamic culture of individual and community growth, learning and leadership, a continually reinventing school.

While the term 'learning community' can be used to refer to the process of ongoing school reform, the term 'reinventing school' was preferred because it not only accommodates the differences between a school and other organisations but it reinforces the fact that the core purpose of the school has to be continually refined. This is a deeper level of ongoing change than is necessarily implied in the term 'learning community' but it depends on and results from learning.

The learning in a continually reinventing school is not only continuous but also multi-valent. It consists of learning *about* many things: about learning itself, about adolescents, about different types of intelligences, about specific areas of human knowledge. It also involves learning *that*: that everyone is a learner, that learning is growing as a human being, that learning is holistic, and not limited to academic learning. It involves learning *how*: how to

use technology, how to live a full human life, how the school can change itself to meet the emerging needs of its students, families and society, and its own organisational needs. Generally, the learning in a continually reinventing school implies building capacity within individuals, between individuals, and as an organisation, as Mitchell and Sackney suggest (2000). This type of learning will involve the external context of the school and also a moral basis for the reinventing school.

Starratt (1996), Sergiovanni (1996) and Beare (2001), all emphasise the relationship of the school with the wider society. Starratt (p.93) argues that the challenge of building a richer form of community in schools is a reflection of the challenge facing society at large, namely, the widespread creation of richer forms of community life into which members are inducted with care. Such rich forms of community life entail responsibility. Sergiovanni's (1996, p.77) concept of the moral community compels principals, parents, teachers and students to pull together in a common cause, and to accept their share of personal and communal responsibility. Both this concept and Starratt's vision for 'a moral school' (p.156) were useful in this study of a reinvention process, reinforcing the need to maintain a focus on the external context of the school.

Although Fullan (1998a, p.42) maintains that 'the school is not now a learning organization...[because] irregular waves of change, episodic projects, fragmentation of effort, and grinding overload is the lot of most schools', many writers use the concept of learning organisations with reference to schools (for example, Lucas, 2002; MacGilchrist, Myers, & Reed, 1997; Redding & Catalanello, 1994; Sammons et al., 1995; Senge et al., 2000). Given that the culture of a school impacts significantly on the young people within it, helping to form their worldview (Beare, 2001), it is especially important to have some understanding of the culture of schools.

## **The culture of schools**

The views of Beare (2001) and Sergiovanni (1996), in particular, helped to shape the understandings of the culture of schools on which this study is based. Beare (2001, p.18) writes, 'Every human being on earth has a world-view and a set of beliefs. When a group of people share common elements of their world-view, when they agree about "the way the world is", then they create a culture.' In Beare's view, 'the development of a set of enabling personal beliefs, and the rites of passage into the culture which one is joining' (p.158) is of profound importance in the education of young people, helping them to 'become...responsible (global) citizen[s]; and grow a personal life-story which defines who they are and where their life is going' (p.18-19). He argues that these are 'factors which interpenetrate the whole of learning, aspects which must not be forgotten no matter what

subject or issue is the topic of the day's learning program' (p.158). It is such a holistic understanding of growth and learning which underpinned this study. The future (transformed) school will do this by assisting each young person to: develop 'a reliable, enabling belief system' (Beare, 2001, p.19).

Hence, the choice of paradigm as discussed earlier, is important in this context. A school may operate from a paradigm of cynicism and hopelessness (L. M. Degenhardt, 2001), perhaps not deliberately, but as part of the 'hidden curriculum' (Gatto, 1992). Alternatively, the underlying paradigm which shapes a school's culture may be based on hope and faith (Fullan, 1997a), constructive concepts in creating a 'reliable, enabling belief system' (Beare, 2001, p.19) for the complex times of the 21<sup>st</sup> century.

Sergiovanni (1996) also links culture and theory in this way, reinforcing the argument, made earlier in this chapter, that the first step in school change must be to clarify and articulate paradigms and values related to life, to the ultimate purpose of education and to change processes:

Culture is an important factor in improving schools. Less obvious is the connection between culture and theory. The heart and soul of school culture is what people believe, the assumptions they make about how schools work, and what they consider to be true and real. These factors in turn provide a theory of acceptability that lets people know how they should behave. Underneath every school culture is a theory, and every school culture is driven by its theory. (Sergiovanni, 1996, p.2-3)

A reinventing school therefore needs to articulate 'common assumptions' (Schein, 1992, p.15) which unify the school community. In answering the research question of how a school in the Mary Ward tradition might reinvent itself, the values and worldview of that tradition, as discussed in Chapter 2, would be the 'common assumptions' to which Schein refers, namely the aim of providing a holistic education which would help develop 'fully alive' human beings (Irenaeus, 185 AD), (cited in Roberts & Donaldson, 1885). At the same time, it would be likely, in the school community's living out these common assumptions, that there would be gaps between the espoused theory and the theory-in-use (Argyris, 1992a). In addressing the sub-question 'What was the reinvention process used within the school to improve the school's response to [the needs of girls at the start of the 21<sup>st</sup> century] within the Mary Ward context?' this study would need to determine the extent to which Loreto Normanhurst drew from the assumptions and values embedded within the Mary Ward culture and worldview, and from the Catholic worldview within which it is embedded.

## The culture of Catholic schools

Catholic schools seek to infuse a Catholic worldview into all their activities, integrating faith and culture (The Congregation for Catholic Education, 1988). The 'shared concept of life' (Sacred Congregation for Catholic Education, 1977, p.21), or 'common assumptions' (Schein, 1992), which underpins them are their focus on the person and message of Jesus (Sacred Congregation for Catholic Education, 1977) and Gospel values such as faith, hope, love, justice, mercy, compassion. Catholic schools recognise parents as having 'the first responsibility for the education of their children' (Catholic Church, 1994, p.485) and emphasise such values as:

- the belief that people are essentially good, made in God's image, although flawed;
- belief in the principle of sacramentality: that God is in all things and the sacred is expressed and experienced in and through material things;
- an emphasis on relationship and community;
- a commitment to history and tradition;
- wisdom rationality, a reflective way of knowing – the role of reason, informed by love and wisdom;
- spirituality, seeking holiness of life and goodness;
- working for justice and social values; and
- hospitality, seeking for the truth wherever it can be found. (Groome, 1998)

The strong commitment to community (Flynn & Mok, 2002; Grace, 2002a; Groome, 1998) stems from the belief that the human person finds both God and him/herself only in relationship to others (Greeley, 1990). In the culture of a Catholic school, the concept of community, and the broader concept of society, therefore has not only a sociological, but also a theological sense, with strong sacramental overtones (D. McLaughlin, 2000, p.118). As Greeley (1990) argues,

The Catholic tends to see society as a 'sacrament' of God, a set of ordered relationships, governed by both justice and love, that reveal, however imperfectly, the presence of God. Society is 'natural' and 'good', therefore, for humans and their 'natural' response to God is social. (p.45)

Hence, a policy of working for the common good and building community is seen as working for the building up of the kingdom of God, and permeates the philosophy and the culture of the Catholic school (D. McLaughlin, 2000, p.67). Bryk (1996, p.33) adds: 'These aims are formally joined in an educational philosophy that seeks to develop each student as a "person-in-community". Not surprisingly, this educational philosophy aligns well with social equity aims.'

Sergiovanni's theory of community for schools, based on a 'vision of life as a sacred community' (p.48-9), also applies well to Catholic schools. It describes the type of learning community aspired to in the reinvention on which this study is focused: a community with a

profound sense of the sacred, and a vision based on a transcendent understanding of human life. As Starratt (1996) argues:

Transcendence is what leads us to turn our life toward someone or something greater than or beyond ourselves... When transcendence is joined with the qualities of autonomy and connectedness, we begin to see how the three qualities complement and feed each other in the building of a rich and integral human life. (p.158)

Understanding aspects of the culture of Catholic schools helped to interpret elements in the case study school, such as its overarching worldview and values, its attempt to 'find God in all things' (W. Barry, 1991; Groome, 1998), the emphases placed on the role of parents, and respect both for individuals, as made in the image of God (Groome, 1998), and for community. A further aspect of the theology and culture of the Catholic school which influenced this study, was the acknowledgement of brokenness and human frailty, and therefore the need for humility, repentance and reconciliation (Groome, 1998; Moloney, 1990). This attitude can be applied to the individual's own journey into fullness of humanity as well as to human organisations and structures, such as the school or the Church itself, resulting in efforts for ongoing reform from within. Since the 17<sup>th</sup> century, one of the hallmarks of the Mary Ward tradition was the commitment 'to genuine reform and renewal of the Church at all times' (from Appendix 4), in many ways, an example of a reinventing culture (Schein, 1992).

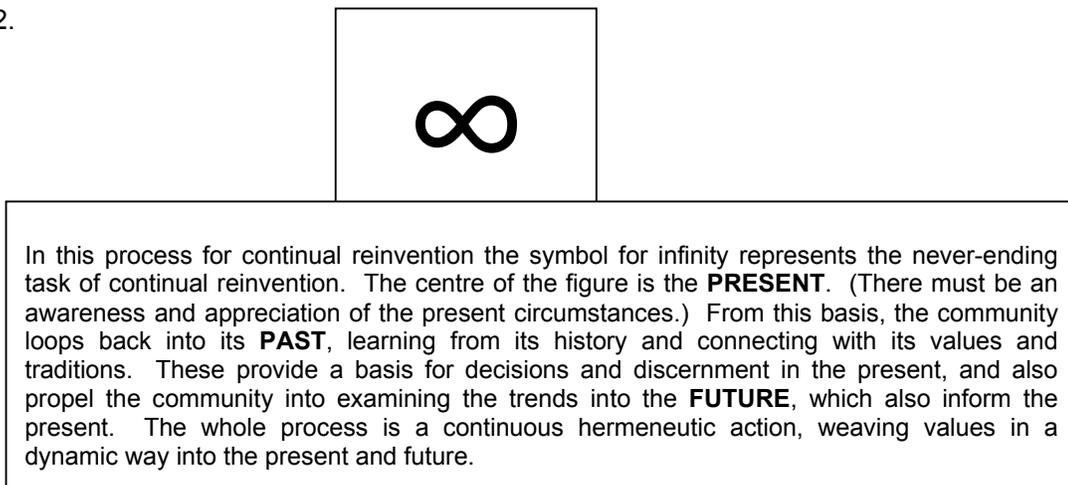
All Catholic schools play a part in, and are influenced by, this renewal of the Catholic Church. People within Catholic school communities often offer a critique of the Church from a position of loyal dissent, as did Mary Ward in earlier times (McClory, 2000), and this helps to explain the part of the school's strategy related to providing 'leadership of Church' (see Appendix 15). The same attitude of critical reflectiveness towards the external secular world is part of the culture of Catholic schools, especially their emphasis on social justice (Bryk, Lee, & Holland, 1993; Flynn, 1992; T. McLaughlin, O'Keefe, & O'Keefe, 1996). As Grace (2002a, p.262) maintains, Catholic schools offer a 'religious critique of the secular, without which both culture and freedom would be diminished'.

In ways reminiscent of Beare's (2001) urging schools to assist young people to develop a sound personal worldview, Catholic schools are involved in the contemporary struggle for the formation of young people and for the shaping of their consciousness (Crawford & Rossiter, 1988; Flynn & Mok, 2002; Leavey, Hetheron, Britt, & O'Neill, 1992). In their striving 'to renew a culture of spirituality, virtue and service to the common good in an increasingly materialist and individualistic global market' (Grace, 2002a, p.262), the culture of Catholic schools generally reinforces the concept of continual reinvention and therefore formed part of the framework for this study.

Nevertheless, there are tensions. The infusing of the spiritual ethos into all the school's activities has been linked to the academic success of Catholic schools (Bryk, 1996; Crowther, Hann, & McMaster, 2001a, ; Flynn & Mok, 2002; Grace, 2002a; Sammons et al., 1995). This very success leads to improved social status, a corresponding pressure on the Catholic principle of 'preferential option for the poor', and a possible weakening of the religious basis of Catholic schools (Fitzgerald, 2006; Grace, 2002a), in other words, a gap between espoused values and theories-in-use (Argyris, 1992a). Furthermore, the institutional Catholic church of the early 21<sup>st</sup> century is experiencing challenges and tensions (Crittenden, 2002; Sheehan, 2002).

Parishes, as the declining attendance and increasing age of active parishioners attest (N. Brown, 2000), are no longer a sufficiently dynamic force in the Church of the 21<sup>st</sup> century, when so much has changed in the Australian way of life. Many believe that new ways of being community are needed. The Catholic secondary school is assuming increasing significance (Cannon, 2004; Grace, 2002b), as the living Church reforms itself under the leadership of the bishops.

To summarise, the need for a reinventing school to base its change efforts on culture, values and vision is emphasised in the literature. As discussed earlier, reculturing is seen as the most effective way to bring about lasting change (Fullan, 1997b; Sergiovanni, 2000). Such concepts in the literature contributed to the values-based process for developing a learning community, or a continually reinventing school, which informed this study. They also gave rise to a hermeneutic process for reinvention based on a living systems, values-based paradigm, illustrated in Figure 3.3, which shaped this research and helped address the research question 'How can a school in the Mary Ward tradition reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century?' and sub-question 2.



**Figure 3.3 Weaving infinity: a hermeneutic approach to reinvention**

The process of developing and supporting such a continually reinventing school culture requires effective leadership. In fact, Schein (1992, p.1-2) maintains that leadership and culture are two sides of the same coin and that the 'ability to perceive the limitations of one's own culture and to develop the culture adaptively is the essence and ultimate challenge of leadership'. Hence, a review of the literature pertaining to leadership, particularly for a reinventing school, is now presented.

## ***Leadership***

What is evident within the literature on leadership is the struggle to discover and articulate forms of leadership appropriate for the demands of the 21<sup>st</sup> century. As Gilley (1997, p.233) states, 'in recent years it has become increasingly apparent that our organisations cannot make the transition required by the fast pace of change in the world today except under one condition: change must happen throughout every level of the organisation almost simultaneously'. This is what happens in a reinvention process, and it requires different types of leadership.

What is apparent in a brief review of the literature on leadership is the move away from a positivist and rational emphasis on predicting and controlling towards an emphasis on the intangible, the affective and symbolic. As Starratt (1993, p.4-5) summarises, 'The previous generation of theories and studies were driven by assumptions about scientific management, rational decision-making, positivist epistemology and behaviourist psychology', whereas 'the newer generation of theorists in leadership tended to move...toward a more descriptive, naturalistic phenomenology of leaders in action'. Similarly, Ciulla's (2003) work (cited in MacNeill, Cavanagh, & Silcox, 2005) noted variations in how leadership was defined from the 1940s. She observed that in the 1990s the emphasis in leadership had become an inter-dependent relationship between leaders and followers. Insights from this 'newer generation' of leadership theory contributed to the framework for this study in addressing the research question and sub-questions 3, 4 and 8. There is, however, no single adequate definition of leadership.

## **Definitions of leadership**

Retallick (2002) claims that 'The literature is replete with definitions of leadership and there is considerable philosophical confusion around the use of the term'. Nevertheless, Gronn (1996; cited in Retallick & Fink, 2002, p.92) maintains that the two attributes which best define a leader are influence and identification, and leading itself is defined as the framing of meaning and the mobilisation of support for a meaningful course of action. Similarly, Leithwood et al. (2004, p.20) maintain that most definitions of leadership will include two

factors: 'providing direction' and 'exercising influence' and 'each of these can be carried out in different ways, and such differences distinguish many models of leadership from one another'. This study drew from several theories of leadership, but they all shared an understanding of leadership as framing meaning, providing direction, exercising influence and mobilising support. What they also had in common was their relevance in meeting the needs of leadership for a reinventing school.

### **Leadership for a reinventing school**

Most of the literature concerning leadership for a learning organisation, and particularly that for a learning community, applies to a reinventing school. The importance of leadership for reinvention cannot be overestimated (Retallick & Fink, 2002), and the biological, organic metaphor is the key to such leadership. Schools which continually reinvent themselves, becoming learning communities, are heterararchical (as opposed to hierarchical) systems, and are organised around systems that encourage evolution, growth and change (McCune, 1988, as cited in Holly 1990, p.201). Because very little is fixed, except change, leadership needs to be based on core values, as previously discussed. Futurists also argue that values and ethics will play an increasingly major role in social life (for example, Noble, 2002; Slaughter, 1991). Values provide the anchor for the creativity and flexibility needed as the community continually learns and adapts to its environment in the present and future. The theories of leadership most suited to a theoretical framework for a reinventing school, therefore, seem to be those which are based on a values orientation, vision, emphasis on relationships and participation, and an external focus.

#### **Values-based theories of leadership**

As discussed earlier, values play a major role in the reinvention of a school, especially for a Catholic school, in the Mary Ward tradition. The theories of several scholars who emphasise the need for personal and communal values to underpin leadership was useful in contributing to the values-based leadership approach for this study. In these theories, leadership consists in helping people find meaning in their life and work. The role of leadership is to reinforce the espoused values of the culture, and to remind people of the meanings embedded within the culture (Starratt, 1993). This is achieved through rituals and celebrations (Deal & Kennedy, 1982), or in 'purposing', where leaders build a sense of the mission of the organisation, interpret events and activities in relation to the mission, embody the values of the organisation and invite a common dedication to the achievement of its purposes (Vaill, 1984, cited in Starratt 1993, p.5).

It is this adherence by the community to a core mission and set of values that provides the stability necessary to support continual reinvention. Such a view of leadership is referred

to as moral and/or ethical leadership (Covey, 1992; Grace, 1995);(Starratt, 1996; 2004a);(Sergiovanni, 1990; 1992; 1996; 2000). Moral leadership 'relies on ideas, values, and commitment. It seeks to develop a shared followership in the school – a followership that compels parents and principals, teachers and students to respond from within' (Sergiovanni, 1996, p.34). Sergiovanni draws also on community theory for the basis of school leadership which, he argues, is 'a process of getting a group to take action that embodies shared purposes' (Sergiovanni, 1996, p.87).

Those shared purposes, as Duignan (2002; 2003) argues in his concept of authentic leadership, need to be worthy and inspiring:

Authentic leadership is centrally concerned with ethics and morality and with deciding what is significant, what is right and what is worthwhile...An important characteristic of authenticity for leaders is the search for personal purpose and relational meaning in contemporary life. This emphasis on meaning in life and work is increasingly associated with a search for spirituality by individuals, groups, even organisations. (p.2-3)

Leadership for a reinventing school is, therefore, concerned with values, meaning, and the development of bonds and mutual influence. This theme is further developed by writers who emphasise the importance of values over technical competencies in leading complex 21<sup>st</sup> century organisations, such as a reinventing school. Starratt (1993), for example, suggests a form of leadership based on sensibility, humility, compassion, dialogue, and an understanding of the fragility of the enterprise, which will enable a hope-filled approach to the post-modern world. In fact, some consider that fostering hope is the leader's primary task (Fullan, 1997a; Walker, 2005).

Bolden (2004), from a review of 29 public, private and generic leadership quality frameworks used in the United Kingdom and elsewhere, concluded that competency-based approaches to leadership fail to match the leadership needs of organisations in the future. Instead, he advocates that present and future leaders need vision and values, namely:

integrity; moral courage; self-awareness and reflection; flexibility/adaptability; empathy and emotional intelligence; humility and humanity; respect and trust; clarity of vision; ability to influence, motivate and inspire.

'The characteristics of tomorrow's great leaders will be an ability to stand firmly between a myriad of conflicting demands and balance the needs of themselves, their followers and the wider world and time to provide a leadership that inspires changes that a post-capitalist world will require.'

(IWM Syndicate Group 3, September 2003) (p.4)

Duignan (2003) makes a similar argument in describing what is needed for leadership of contemporary service organisations:

Leaders...have to make choices in...paradoxical situations [and therefore] require more than management skills and competencies. They require creative, intuitive frameworks based on in-depth understandings of human nature and of the ethical, moral, even spiritual dimensions inherent in human interaction and choice. Above all, they need sound judgement and a wisdom derived from critical reflection on the meaning of life and work. They have to be people of heart who are emotionally mature enough to develop mutually elevating and productive relationships. (p14)

The concepts of authenticity, self-awareness and transformation to which these writers refer influenced not only the models of leadership for a reinvention process but they also influenced the research methodologies used in this study, as discussed in Chapter 4. Overall, as argued above, a values-based approach to leadership focuses not only on the values of the organisation but also on the personal values and moral qualities of leaders, who come to embody the values of the organisation and invite a common dedication to the achievement of its purposes. Greenleaf's (1977; 1996) theory of servant leadership and Collins' (2001; 2001b) Level 5 leadership provided useful insights on leadership as modelling to the framework for this study.

#### **Theories of leadership based on the modelling of leaders**

Overall, servant leadership is based on an attitude of personal humility. Servant leaders see their role not in terms of self-aggrandisement but as a service to others. Greenleaf, like Duignan (2003) and others, identifies necessary qualities which leaders need to have and to model, namely, hope, laughter, spirit, faith, care, listening and healing, growth, purpose and foresight. He also refers to openness and 'being who you are' - which resonates with the Mary Ward value of sincerity, where 'we should be such as we appear and appear such as we are' (Honner, 1998).

Identification of the need for foresight identified by Greenleaf also made servant leadership a valuable inclusion in the framework for leadership in this study:

Foresight is the 'lead' that the leader has. Once one loses this lead and events start to force his or her hand, one is leader in name only...Required is that one live a sort of schizoid life. One is always at two levels of consciousness: one is in the real world – concerned, responsible, effective, value oriented. One is also detached, rising above it, seeing today's events, in the perspective of the long sweep of history and projected into the indefinite future. Such a split enables one better to foresee the unforeseeable. (Greenleaf, 1996, p.22)

A servant leader, while aware of the need to adapt for the future, does not seek to control through coercion or manipulation but uses persuasion, which Greenleaf describes as 'dynamic, sustained, and challenging. It may repel some who might be followers of a less insistent leader. The leader will be prepared for rebuff and failure, however, and will need a sustaining spirit' (p.37). However, '[t]he inner resources of the leader are known by both

leader and follower to be dependable. The test: a leader feels strong and is accepted by followers as being stronger than most people' (p.24).

Similar themes of both strength and humility are found in Collins' (2001) Level 5 Leadership theory. Level 5 leaders combine 'deep personal humility' with 'fierce professional resolve'. They are at once 'modest and willful, humble and fearless' (Collins, 2001b, p.22)

Level 5 leaders channel their ego needs away from themselves and into the larger goal of building a great company. It's not that Level 5 leaders have no ego or self-interest. Indeed, they are incredibly ambitious – *but their ambition is first and foremost for the institution, not themselves.* (author's italics) (Collins, 2001b, p.21)

The theories of leadership already discussed have in common the need for leaders to be self-aware and in touch with themselves. Gilley (1997) also stresses this: '[Organisations need] individual leaders who have the courage to look inside and develop a loving relationship with themselves so they can stop needing to get from others what they most need to give themselves' (p.6). These insights were valuable in creating the framework for leadership for a reinventing school used in this study.

In discussing leadership for a reinventing school, leadership is understood not to emanate solely from the principal and those in positions of formal authority, however. A learning community needs to be a community of leaders.

### **Shared leadership theories**

The literature on learning communities, discussed earlier, implies that leadership for a reinventing school is a collective responsibility and will involve the members of the school community. As Mitchell and Sackney argue,

...in a learning community, individuals feel a deep sense of empowerment and autonomy and a deep personal commitment to the work of the school...this implies that people in the school form not just a community of learners but also a community of leaders. (Mitchell & Sackney, 2000, p.93)

This results in a 'leadership dance' which moves back and forth among many different configurations of leadership and leaders. At times, this may include all the individuals in a school (p.94). Those in formal leadership positions in schools need to model power sharing. 'Power sharing requires principals and other administrators to sublimate their egos to the collective potentialities of the school staff...the ultimate goal is for an appropriate and ubiquitous flow of power in support of teaching and learning' (Mitchell & Sackney, 2000, p.96).

In a reinventing school, the principal may see her/his role as that of catalyst, enabler, supporter, and 'weaver' (Fink & Stoll, 1997; Palmer, 2004). Confident of the values and commitment of the school community, s/he may lead from 'the centre of the web of human relationships' (MacBeath & MacDonald, 2000, p.20; Murphy, 1994) or 'from the back of the band' (Leithwood, Begley, & Cousins, 1992). In this way, the wisdom of the school community can determine the future direction of the school, and all are involved in shared, or distributed, leadership.

There is a sizeable, and growing, body of literature about shared or distributed leadership in organisations and in schools (for example, Bradford & Cohen, 1998; K. Brown & Anfar, 2002; Duignan, 2004b; Durrant, 2004; Fullan, 2004; Hatcher, 2005; Little, 1995; Riley, 1998, 2001b; Sackney & Mitchell, 2001; Spillane, Halverson, & Diamond, 2004; Starratt, 2003; Wilson, 2004; Youtt, 2004). Many writers support the concept of shared leadership in enabling school reform, (Fullan & Hargreaves, 1998; Handy & Aitken, 1986; Sackney & Mitchell, 2001; Telford, 1996), and particularly teacher leadership (K. D. Anderson, 2004; Crowther, Kaagan, Ferguson, & Hann, 2002; Darling-Hammond et al., 1998; Harris, 2004; Lieberman & Miller, 2004), so that it is widely perceived as desirable.

However, within the shared leadership literature, issues are raised concerning culture, power and ultimate accountability. To some extent, shared leadership is a counter-cultural concept. Mitchell and Sackney maintain that if shared leadership and shared power are to emerge in a school, there needs to be a particular culture in place that can support and sustain these sorts of assumptions and practices. 'Culture is the narrative glue that holds the participants together' (Mitchell & Sackney, 2000, p.97). Deference to authority is nevertheless deeply ingrained within a wider society that is fundamentally hierarchical (MacBeath & MacDonald, 2000; Mitchell & Sackney, 2000), making it hard 'for the organisation and the community to permit the principal to let go' (Murphy, 1994, p.26). Moreover, some staff may be sceptical about an inclusive process for setting the school's future direction. Louis and Miles (1990, p.195) identify 'the paradox that participation can increase alienation,...by increasing the profound conviction of many urban teachers that they are manipulated by administrators who do not understand the circumstances of their work.'

Hatcher (2005) also expresses scepticism about shared leadership, claiming that principals control the strategic agenda, as agents of the government. Efforts to gain the commitment of teachers are seen as 'colonising the affective domain' (p.3) and teacher leadership may be limited to operational rather than strategic decisions: 'While participation is nominally inclusive, authority is exclusive' (p.5). Little (2003) concurs with much of this view, seeing

that teacher leadership has accomplished a division of labor without entailing much initiative in matters of purpose and practice.

These insights are useful in explaining potential differing perceptions among the staff of a reinventing school regarding the extent of participation and inclusion in the reinvention process. Other factors could also explain such differing perceptions or actual levels of shared leadership. Day et al. (2001b, p.21) argue that 'the opinions of any individual...are inherently "biased" by the position from which they have observed events'. Thus a person's worldview and/or past experience will shape their perceptions of shared leadership. Some teachers will be sceptical in their attitude and others simply will not wish to be involved in shared leadership. Mulford and Silins (2003, p.180), for example, found that 'larger metropolitan schools, staffed by experienced and ageing teachers, did not provide the environment most conducive to...teacher distributive leadership'.

On the other hand, Wilson (2004) raises other issues with regard to shared leadership, suggesting that there is a crisis in school leadership in Australia, since many principals feel powerless. He points out that issues of accountability are at the core of leadership:

But is everyone a leader? One way of working out the answer is by finding out who goes down with the ship. How does accountability work when there is a hole in the budget, or the school's performance is drastically below expectations? Do all members of staff wave bravely from the bridge as they disappear beneath the waves? I don't think so.

The theory of parallel leadership (2001a; Crowther et al., 2002) attempts to resolve this problem. Parallel leadership blends strategic leadership by the principal and senior leaders with shared leadership in which teachers and the school community is involved, thereby providing a clear role for the principal within the context of a collaborative school culture.

### **Contextual or situated approaches to leadership**

Because this study focused on reinventing a school so that it could respond more appropriately to changes in its internal and external context, theories of leadership based on adapting to the needs of the context or situation were helpful in framing this study. As early as 1969, Hersey and Blanchard's situational leadership theory advocated varying leadership styles depending on the stage of development of followers, whereas Schein (1992) maintained that different types of leadership were needed for different stages of an organisation's development. More recent literature also emphasises the need to heed the context, internal and external, within which leadership is exercised (Aldoory & Toth, 2004; Bolden, 2004; Grover & Walker, 2003; Hallinger, 2003; Kirkham, 2005; Spillane et al., 2004). Not only are the needs of people different, and changing, but the external realities within which schools operate are changing rapidly.

While the trend towards 'leadership by adjectives' needs to be viewed with caution lest important themes common to successful leadership are overlooked (Leithwood et al., 2004), leadership theories which emphasise interdependent elements, and the context within which leadership is exercised, offered valuable insights for this study. In particular, theories of relational leadership for change (Louis & Riley, 2000) and values-led contingency leadership (C. Day, Harris, Hadfield, Tolley, & Beresford, 2000) shaped the research and helped address the question, 'What types of leadership were most suitable in the reinvention process?'.

Although they question the generalisability of situated leadership, Louis and Riley focus on the intersection of leadership and change, which they consider has been inadequately represented in the education leadership literature. In fact, MacNeill (2005) argues that 'change is an a priori part of leadership' otherwise the so-called leader is merely the manager of the *status quo*. 'Relational leadership for change' is presented as a way of addressing this nexus (Louis & Riley, 2000). It also assists in understanding the emergence of new actors and roles, including teacher unions, which are shaping the direction of education. Louis and Riley claim that the education leadership literature 'is excessively occupied with a "consensus model" for organisational change' (p.6). Given that the literature of educational reform warns that conflict is an inevitable companion of major change (Hargreaves, 2003b; Louis & Miles, 1990; Marzano et al., 2005), relational leadership for change was a useful contribution to the framework for this study of a reinventing school.

Relationships and context are also embedded in the approach to leadership developed by Day et al. (2001a; 2001b; 2000). Their 'values-led contingency' theory incorporates:

- values and vision - personal alignment and organisational alignment;
- integrity - consistency and integrity of actions;
- context - understanding internal/external environments, adaptive, balance between involving others and taking individual action;
- continuing professional development - power with and through others; and
- reflection - developing the self (Gurr, 2001)

This theory was relevant to the framework for this study of a school which was attempting to respond and contribute to the external context, a school in which a high value was placed on reflection and personal transformation, which emphasised the importance of relationships and was based on clearly articulated values.

Within the leadership theories discussed above, the role played by the principal varies. While always considered important, the role of the principal of a school has evolved, as a plethora of literature illustrates.

## **The role of the principal**

In earlier times, the role of 'principal teacher' was primarily that of teacher, but with additional responsibilities. Teachers may, for example, recall the 'golden age' (Louis & Miles, 1990, p.186-7) when this was so, and therefore question resources directed into leadership and management of the school as organisation. Handy (1986), however, points out the anomaly of schools, as busy and complex organisations, relying on part-time management from busy professionals. Indeed, much of the literature of earlier decades drew parallels with the business world, and the role of principal was seen as that of 'manager'. This view was superseded by the school effectiveness movement.

School effectiveness literature emphasises the centrality of the role of principal as instructional leader, responsible for implementing externally mandated reforms (Sammons et al., 1995) whereas, within a school improvement orientation, the role of principal emphasises the support of teachers to develop reforms based on local needs. A transformational or reculturing approach to change in schools necessitates a transformational leadership approach on the part of the principal (Murphy, 1994). This is a much more diffuse approach: there is no consensus among practitioners, researchers, or policy makers as to the appropriate role of the principal in such a school (Hallinger & Hausman, 1994, p.173).

In fact, the literature warns that conflict and tension are to be expected (V. Boyd, 1992, p.3; Hallinger & Hausman, 1994, p.171-3; Lieberman, 1995, p.11; Murphy, 1997, p.46). Many principals may experience significant role tension as they struggle with a philosophy of leadership which is not aligned with their own views, or find themselves caught in between dissatisfied teachers and other groups to whom they are accountable. Grace (1995, ch.9) alludes to the role tension for principals of Catholic schools, in particular, which emanates from the tension between striving to be a successful school, as judged by external, market-driven criteria, and yet exercising a 'preferential option for the poor'. A further difficulty arises when principals of Catholic schools take action against a staff member who is not performing satisfactorily. Such action, although exercised out of care for students, can be labelled uncaring of staff (Grace, 1995). These insights into the role of principal needed to be incorporated into the framework for this study of the reinvention of a Catholic school, and so also was the emphasis in the literature on the need for principals to expand their activities with external constituents.

Since the boundaries between schools and their communities are becoming more permeable, the need for principals to relate with parents and other members of the school community is greater, environmental leadership is more important and a marketing

orientation is necessary (Murphy, 1997, p.47; Reynolds & Packer, 1992, p.177-8; Vining, 2001). For these reasons, and also because of the potential influence of the school on the wider society, discussed earlier, an externally-focused approach to leadership on the part of the principal of a reinventing school is important. The 21<sup>st</sup> century principal's role is that of a highly relational change agent within and beyond the school. Principals 'must learn to influence and coordinate non-linear, dynamically complex, change processes' (Fullan, 1998a, p.74). This is the work of leading a reinvention process.

Recent research on the leadership of women provides insight into this new work of school leaders and useful examples for leading a reinvention process. As Fullan (1998a) suggests, 'women tend, more than men, to negotiate conflict in ways that protect ongoing working relationships (as compared with seeing conflict in win-lose terms), and they tend to value relationships in and of themselves as part of their commitment to care (rather than seeing relationships as instrumental to other purposes)' (p.74). Following Fullan's suggestion, especially since this study was focused on a school for young women, based on an ethos which celebrates the contribution of women, and is staffed and led mainly by women, this chapter ends with an examination of some of the literature relating to women in educational leadership.

## **Women and educational leadership**

As well as in the work cited earlier, Fullan also alludes to the role of women in educational leadership:

In Australia, Blackmore (1995) has described how increasing numbers of women in the principalship are becoming the emotional middle-managers of educational change, using what liberal feminists call women's ways of organising and knowing (Gilligan, 1982; Belenky et al., 1986) to smooth the process of organisational development and change. (Fullan, 1997b, p.12)

Hargreaves (1997), however, draws attention to the risks for women principals. Women principals are more likely to take 'soft' human relations decisions, while the top-level culture is predominantly masculine and mandates system-wide changes, imposes testing requirements and demands detailed accountability. He expresses concern also for the personal toll on women principals as they try to build caring cultures and positive change in policy contexts that are deeply inimical to them (p.59).

Other writers allude to the positive potential of women as leaders in the learning community and their ability to change the culture. Grace (1995, p.60-2) refers to a 'female culture' of educational leadership, the characteristics of which include: 'greater interpersonal and care sensitivities; a strong and central focus upon the quality of teaching and learning and

of relationships with children and students; a more democratic and participatory style of decision making with different conceptions of relations with the wider community, of the use of power and of the nature of educational leadership' (p.60). As Schein (1992, p.367) states:

It is also worth noting that in many cultures, notably Western ones, the assumption that one knows and is in control is particularly associated with masculine roles. It is quite possible that women as leaders will find it easier to accept a whole range of methods for arriving at solutions and will therefore be more able in a learning role.

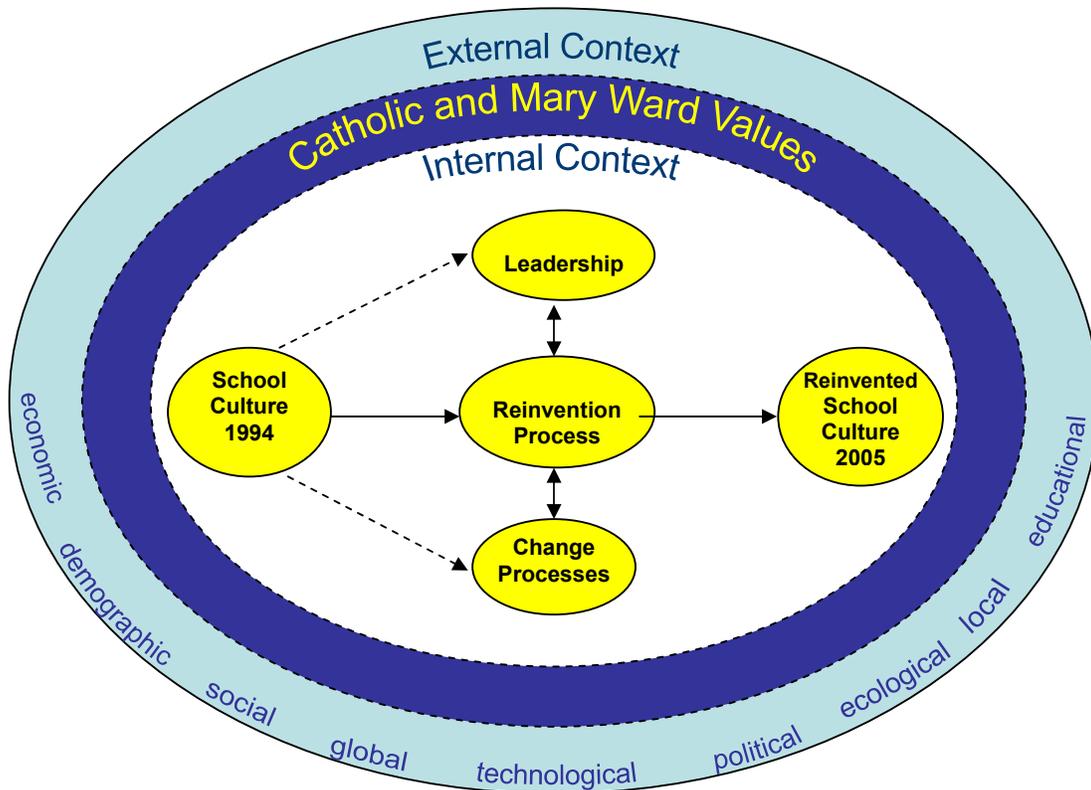
For this study of an all girls' school, led by a woman principal, these insights were important to include in the conceptual framework, as they revealed a range of both potential strengths and risks for a woman in the role of principal of a reinventing school.

In conclusion, this review of the literature reinforces the notion that change, culture and leadership are inextricably woven together. Weaving is an appropriate metaphor, used also by others (Fink & Stoll, 1997), to describe the complex but holistic work of a school as a learning community. To arrive at the point of being a learning community, a school needs to continually reinvent itself. This process is best achieved by an emphasis on values, an acceptance that the culture of the school needs to constantly adapt to the needs of the external environment as well as its own internal context, and an approach to leadership which is focused on the future, combining a strategic role for those in formal leadership roles with a shared leadership role for the whole school community. The interaction of these elements can be illustrated in a conceptual framework.

### ***Conceptual framework for this study***

Figure 3.4 illustrates the interrelationship of the elements of context, values, culture, change and leadership discussed in the review of the literature in this chapter. This research is based on the premise that education is integral to the growth and wisdom of every person, producing well-rounded human beings who function well in, contribute positively to, and actively critique the communities, and broader society, of which they are a part. It therefore stems from a holistic understanding of education. In order to accommodate this understanding of education, the model of schooling needs to change. Schools need to be viewed as complex, highly relational organisms: flexible, adaptive, constantly evolving in response to changing environments.

The changing elements of the external environment – economic, demographic, social, global, technological, political, local and educational - are represented in the broad outer circle of the diagram. The middle band represents the values on which the school in this study was based as a Catholic school in the Mary Ward tradition. Significantly, this band is



**Figure 3.4 Conceptual framework for this study**

porous, represented by the dotted lines, thus indicating that the external environment is interpreted and mediated through the medium of the school's values. Conversely, the school interacts and influences the external environment through its values framework.

The 'internal context' signifies the workings of the school community, the changing needs of its members and its culture. The culture of the school as it was in 1994 appears on the left. The reinvention process, brought about by leadership through a series of change processes, including the 2001 strategy process, led to a changed school culture in 2005. The leadership theories implicit in this framework were those related to leadership for change and reinvention, based on values, as discussed earlier. The change processes were informed by a range of literature related to school reform, as well as theories of change and transition management.

The overall reinvention process was informed by the literature on alternative paradigms related to the purpose of education and alternative paradigms of change. Through an ongoing, reflexive process, the reinvention process impacted on both leadership and the change processes adopted, and resulted in a changed school culture by 2005. This evolved culture is depicted as a 'reinvented' school culture simply because this was the time at which this research ended. The task of reinvention, as explained in this study, is

continual: the aim was for the school to be continually reinventing. Therefore, there will never be a point at which the school culture is reinvented.

In conclusion, this study of a holistic change process within one school, is itself based on a holistic approach to research and is therefore a potential contribution to the literature on change in schools. In Chapter 4, which follows, the research design and methodology used in this study are presented.

## **CHAPTER 4: RESEARCH DESIGN AND METHODOLOGY**

The specific ways in which this study was approached are outlined in this chapter. The characteristics of qualitative enquiry are addressed, followed by an outline of the paradigms and philosophies which influenced the study. The latter parts of the chapter focus on the research design, ethical issues, the role of participant-as-researcher, and methods of data collection and analysis. It ends with an outline of the trustworthiness and transferability of conclusions reached.

This study describes and analyses how one school, Loreto Normanhurst, attempted to remain true to the values and vision of its 17<sup>th</sup> century foundress, Mary Ward, while adapting the education it offered to the needs of Australian girls at the start of the 21<sup>st</sup> century. It is an ethnographic case study (Goetz & LeCompte, 1984), since it examines how the members of a particular school setting and culture made meaning and sought to interface with the changing world beyond the school (Argyris, 1992a; Schein, 1992). The 'case' is the reinvention process within this one school community between 1994 and 2005. The intense phase of data collection for the study was between 2001 and 2004, whereas the antecedents of the case extend back to 1994.

The researcher was an insider, the principal of the school in question, and therefore a participant-as-researcher (Limerick, Cunnington, & Crowther, 1998). Since her insights, experiences and constructed meanings constitute a significant part of this research, the study borrows from the traditions of autoethnography (Buzard, 2003; Delyser, 2001; Ellis & Bochner, 2000) and transpersonal research (1998; Braud & Anderson, 1998). Further, the researcher/principal's position in the school necessitated certain methodological techniques, and these are discussed within this chapter. The study uses a mixed methodology (Creswell, 2003): while primarily a qualitative study, whenever appropriate, quantitative data were used to assist in answering the research questions below.

### ***The research question***

The essential question on which this study is based was:

'How can a school in the Mary Ward tradition reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century?'

This research question was answered through a series of sub-questions:

1. What are the needs of girls at the start of the 21st century in the context of the traditions and values of a Mary Ward school?

2. What was the reinvention process used within the school to improve the school's response to these needs within the Mary Ward context?
3. What factors assisted the reinvention process?
4. What factors hindered the reinvention process?
5. How was the reinvention process experienced by key stakeholders?
6. Were Mary Ward's values retained in the reinvention?
7. How successful was the school in meeting the needs of girls at the start of the 21st century through the reinvention?
8. What types of leadership were most suitable for the reinvention process?
9. What were the learnings from the reinvention process?

These questions could be addressed in a range of ways. Even when researchers formulate comparable research questions and problems, how they view the world, and variations in their philosophical assumptions and theoretical perspectives, may result in different ways of conceptualising a problem, leading to different choices in the collecting and analysis of data, and different interpretations of the findings (Goetz & LeCompte, 1984). As Stake (2000b, p.449) explains, 'seen from different worldviews and in different situations, the "same" case is different'.

The researcher in this study, while integrally involved in the case, sought to provide an objective, chronological narrative of events relevant to the case, blending a description of events with analysis (Cohen et al., 2000). The researcher's experience and philosophies may, however, influence the data and its interpretation. To the extent that they are consciously held and capable of being named, this experience and these philosophies need to be made explicit.

### ***Paradigms and perspectives – Influencing philosophies***

This study, and the techniques used within it, was shaped primarily by an interpretive paradigm within a qualitative research paradigm. The constructivist approach to knowing, based on the belief that knowledge is socially constructed (Denzin & Lincoln, 2000b; Stake, 1995), and outlined in Chapter 2 as the basis for learning at Loreto Normanhurst, is closely aligned with the interpretive paradigm. This paradigm assumes a relativist ontology (that there are multiple realities) and a subjectivist epistemology (that researcher and respondent together create understandings) (Denzin, 1997). As Mitchell and Sackney (2000, p.33) explain, 'an individual can only understand knowledge as it is constructed by the mind, and what is in the mind is a complex and curious amalgam of prior personal and collective history - the 'fabric' of context and culture.' It is important, therefore, to explain

some background details of the researcher, as well as the lens through which she selected and analysed data.

### **The researcher's background**

The researcher had over three decades of experience in a wide variety of schools, which included Montessori and primary education, and a range of government, independent and Catholic secondary schools in rural, urban and suburban locations. She had many years' experience in principalship, more than eleven of which were as principal of Loreto Normanhurst, as its first lay principal. This experience, together with her postgraduate studies in educational leadership, a range of central office positions and committee memberships, and the lived understanding of the needs of young women as the mother of two daughters, gave her an understanding of both theoretical and practical issues in contemporary girls' education. Her background and experiences provided a particular framework within which she, as researcher, understood and interpreted the case phenomena. Just as it is important in qualitative research to clarify the background of the individual researcher, so too, for this study, is it important to clarify her understanding of the concept of 'school'.

In this study, 'school' was regarded as a dynamic, responsive and alive organism or community, with as many perspectives on reality as it has members. The aim of this case study was to understand Loreto Normanhurst, one particular such organism and its constituent people (Stake, 1995), as it attempted to reinvent itself, undergoing a form of self-directed evolution. In line with an interpretive paradigm, 'tidy' answers and conclusions were neither expected nor found.

Given that this school had a long tradition of educating girls and encouraging the active contribution of women to society, as a school in the Mary Ward tradition, it was appropriate that this study adopted elements of a feminist perspective. A number of writers claim that a feminist perspective gives greater insight into a women's organisation, especially through the use of phenomenological and interpretive techniques (Braud, 1998; Lather, 1991; Madriz, 2000; Olesen, 2000). These techniques include emphasis on reflexivity, or reflection on the research process (Gunter, 1997; Starratt, 1996), and an emphasis on the researcher as well as the researched (Lather, 1991; Olesen, 2000). The study also aimed to be sensitive to participants' perspectives and to situate itself historically, culturally and personally (Gergen & Gergen, 2000) within the broader context of the 21<sup>st</sup> century, and the life and worldview of the researcher.

Some of the research and methodological challenges of this study were also informed by insights from a feminist perspective, in particular, issues such as how the researcher's

voice was treated *vis à vis* the other voices (Gergen & Gergen, 2000; Olesen, 2000) and of the need to be clear on whether that voice reflected the role of the principal of the school or that of researcher. In fact, each individual participant can be seen as polyvocal i.e. each person has many 'selves' (Olesen, 2000). The work of Lather (1991) and Hackmann (2002) was especially useful in finding ways to address these issues.

To summarise, all research is shaped by the paradigms and philosophies held by the researcher and, in this instance, led to the adoption of an interpretive paradigm and a qualitative methodology. The characteristics of this research paradigm are now considered.

## ***Research design***

### **Characteristics of qualitative enquiry**

Qualitative research seeks to understand human behaviour as a holistic experience, in a particular setting, and from the viewpoint of those in that setting (Cohen et al., 2000; Goetz & LeCompte, 1984; Lincoln & Guba, 1985; Miles & Huberman, 1994). This study was intended to acknowledge and capture the complexity and nuances within a particular school community as it attempted to reinvent itself. Denzin and Lincoln (2000b, p.5), for example, refer to qualitative research as 'bricolage', quilt-making, as 'the quilter stitches, edits and puts slices of reality together'. Fink and Stoll (1997) write of 'weaving' with reference to qualitative research in schools and Creswell (1998, p.13) uses a similar theme, describing qualitative research as 'an intricate fabric composed of minute threads, many colors, different textures, and various blends of material'. This researcher sought to weave together many strands in order to make sense of the whole reinvention process and to create such a 'fabric'. Many ontological and epistemological premises, which form the basis of a qualitative approach to research, contributed to this 'fabric' (Cohen et al., 2000; Denzin & Lincoln, 2000b; Lincoln & Guba, 1985) and are now outlined. One of these was the understanding that participants would have a range of views and interpretations of events in the reinvention process. These premises also underpinned the research sub-question 'How was the reinvention process experienced by key stakeholders?'

### **Multiple perspectives and interpretations**

The opinions held by and within the different groups which comprised the school community - for example, staff, parents, students, governors – were likely to vary widely (Hackmann, 2002; Walford, 2001). Different individuals have different emphases, goals and prior experience (Stake, 1995), and are therefore likely to interpret and evaluate a situation differently, even if they experience the 'same' phenomena. Qualitative research

acknowledges that there are multiple interpretations of, and perspectives on, single events and situations, and that reality is multi-layered and complex (Cohen et al., 2000; Denzin & Lincoln, 2000b). In this study, these multiple realities sometimes provided quite contradictory views of what was happening, as Stake (1995) explains. Further, situations, events and behaviour were affected by context. Recording the context within which participants' views were formed and expressed, by means of 'thick description' (Gomm, Hammersley, & Foster, 2000a; Travers, 2001; Wolcott, 1988), helped to reveal meaning. The researcher's role in this process was to respect the range of views and yet weave together a meaningful whole, thereby constructing a further interpretation of the social world of the school.

### **The researcher as instrument**

The nature of this research, and the research approach taken, placed the researcher at the heart of data collection, analysis and interpretation. In fact, the researcher was, to a large extent, the 'research instrument' (Eisner, 1991; Larson, 1992; Morse & Richards, 2002; Walford, 2001). Situations and events needed to be examined through the eyes of participants, as well as through those of the researcher (Cohen et al., 2000), however. This required both an *etic* perspective (an outsider's view, in order that this research might contribute to the field of scholarship in the area of change in schools (Goetz & LeCompte, 1984)) and an insider's or *emic* perspective (sensitive to and appreciative of the viewpoint of participants (Flick, 1998)), sometimes referred to as a *Verstehen* approach (Cohen et al., 2000; Crotty, 1998; Gomm, Hammersley, & Foster, 2000b). The researcher was also able to reflect on the research process as it evolved, and make appropriate alterations to the research design as necessary.

### **Emerging research design**

Throughout the course of this study, there were several adaptations of the research design. These included continual refinement of the research questions in order to identify the core of the study more precisely, many refinements to the research approach in order to ensure a wide range of views, and refinements to confidentiality mechanisms to assist participants in speaking their minds. This is a further characteristic of qualitative research: some specifics of the research design may emerge as the study unfolds and data categories generally emerge after rather than before data are collected (Larson, 1992). Additional detail is supplied in Chapter 5. Within the field of qualitative research there are, however, many research traditions. Although primarily a case study, this research drew from several traditions within qualitative research.

## **Traditions within qualitative research**

From the outset, ethnography (Denzin & Lincoln, 2000b), within a case study tradition, was the predominant research approach adopted for this study. Nevertheless, as the research design evolved, additional traditions were incorporated. As Leedy (2001) argues, in planning qualitative research, the methods are limited only by one's imagination. In particular, the traditions of autoethnography (Buzard, 2003; Delyser, 2001; Ellis & Bochner, 2000) and transpersonal research methods (Braud, 1998; Braud & Anderson, 1998) were selected for their relevance and usefulness to this study. Before discussing these latter traditions, however, it is important, at this point, to clarify both why a case study approach was selected for this study and the salient features of this research tradition.

### **Case study**

Qualitative case study research is considered an ideal design for understanding and interpreting observations of educational phenomena (Merriam, 1988). Yin (2003, p.1) also argues that 'case studies are the preferred strategy when "how" or "why" questions are being posed, when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real-life context.' Given that this study was the study of the reinvention of a school, and that the phenomena described above by Yin apply to this study, a qualitative case study was a logical choice of methodology.

Of the several ways of understanding case study (for example, Gomm et al., 2000b; Wolcott, 1992; Yin, 2003), this study adopted the view of case study as a *unit of study* (Gillham, 2000; Leedy & Ormrod, 2001; Merriam, 1998; Miles & Huberman, 1994; Stake, 1995). It began with the phenomenon to be studied because 'case study is not a methodological choice, but a choice of what is to be studied. By whatever methods, we choose to study the case' (Stake, 2000a, p.435), that is, a unit around which there are boundaries (K. Brown & Anfara, 2002), a 'bounded system' (Smith, 1979). In this study, the 'case' was the reinvention process within Loreto Normanhurst between 1994 and 2005. The study attempted to describe and analyse the close-up lived reality, using 'thick description' (Geertz, 1973) of participants' lived experiences of, thoughts about and feelings for, a situation (Cohen et al., 2000) in an effort to understand their perceptions of events. Since this research is, therefore, the study of culture, and how the culture of a particular school can be reinvented, it adopted some of the traditions of ethnography.

### **Ethnography**

Ethnographic research draws on the insights and frames of meaning of participants (Bernard, 1995; E. Chambers, 2000; Cohen et al., 2000; Morse & Richards, 2002; Walford,

2001). It is empirical and naturalistic as it includes sensory accounts of phenomena in a real-life setting. It describes phenomena with the aim of understanding the complex interrelationships of causes and consequences that affect behaviour and belief. It also uses a variety of research techniques. One of the key purposes of this study was to record and reflect the 'voices' and perspectives of a range of stakeholders (Lather, 1991) as they experienced the processes of change within the school community. In so doing, phenomenological methods were incorporated into the ethnographic tradition. These are apparent in the study's inclusion of many perspectives and its emphasis on direct observation of phenomena, seeking to sense reality and to describe it in words that reflect consciousness and perception, rather than numbers (Bernard, 1995; Goetz & LeCompte, 1984; Morse & Richards, 2002). Goetz and LeCompte (1984, p.9) explain that ethnography 'admits the subjective experiences of both investigator and participants into the research frame, thus providing a depth of understanding often lacking in other approaches to research'.

The fact that, in this study, the researcher was principal of the school, as well as participant in, and leader of, the reinvention process, required a special approach to data collection, analysis and interpretation. The emerging tradition of autoethnography is particularly concerned with the role of researcher as participant, and was therefore a useful incorporation into the research design. The inclusion of autoethnography, and the related tradition of transpersonal research methods, was not originally planned as part of the methodology of this research, but proved to be one of the unanticipated findings of the study, and is discussed in Chapter 5.

### **Autoethnography and Transpersonal Research Methods**

The researcher in this study, as principal of and change agent within the school, was integral to the school's reinvention process. Her own experiences constituted significant data in the study. The field of autoethnography accommodates such a situation (Buzard, 2003; Delyser, 2001; Ellis & Bochner, 2000; Morse & Richards, 2002; Sandstrom, 1999; Spry, 2001). In particular, the phenomenon of the researcher who is already a member of the community being studied, and who continues as a member after the research is completed, is receiving increasing attention in the literature (for example, Delyser, 2001; Smyth & Holian, 1999).

Transpersonal research acknowledges that the researcher is transformed through the process of conducting the research (Braud, 1998; Braud & Anderson, 1998), and thus was apt for this study. Further, because the transpersonal research approach places value on both intuitive and spiritual dimensions, it was considered appropriate for a study located in

a school with a spiritual and feminine orientation, and for a researcher with a deep respect for such elements.

Several aspects of this study are included among Heron's (1996, p.38) list of areas appropriate for transformative inquiries. Included in this list are such areas as the transformation of:

1. the social structure, including development of a self-generating culture;
2. education, including self-directed, holistic learning;
3. professionalism, including creating a culture of competence; and
4. personhood, on many levels.

This personal transformation, because of the inquirer's presence in and interaction with the research domain, extends into social and environmental transformation (Heron, 1996, p.107), that is, the changes in the researcher lead to changes in his/her milieu. Aspects of this research had implications not only for the researcher but also for her role as principal and as change agent. Thus the study itself, through the researcher/principal's own transformation, contributed to the reinvention of the school. This is discussed in later chapters, especially Chapter 5. The implications of such a multiplicity of roles led also to the decision on the 'voice' used in reporting this study.

The norm for writing up autoethnography and transpersonal research is use of the first person. In this study, the third person – an arguably more traditional mode of reporting – is used, mainly for reasons of clarity. As described above, the researcher in this study held several roles simultaneously, all of which were interrelated. To use the 'I' voice could be confusing: is this pronoun referring to the researcher in this study? to the principal, an organisational actor? to the change agent, another organisational actor role? or to the human being coping with the demands of a complex situation and being transformed as a result? To avoid confusion, the third person was used in reporting the study, but it needs to be understood that this is a somewhat artificial separation.

Yet it was not only the avoidance of confusion in reporting which was a challenge. Because the researcher, as principal of the school being studied, was in a position of power, other issues also had to be addressed. The next section provides details on how two major concerns - the protection of participants and the protection of the research – were managed.

### ***Ethical considerations in the research design***

Leedy (2001) claims that most ethical issues in research fall into one of four categories: informed consent, right to privacy, protection from harm, and honesty with professional

colleagues. Using this framework, the ethical issues inherent in this research are discussed, together with the methods used to address them. Following this is a discussion of insider research and its implications.

### **Informed consent**

The school community was informed in January, at the start of the 2002 school year, that the research was being conducted and staff members, in particular, were invited to express any concerns they might have about the research. None were forthcoming. Informed consent was obtained from all individuals participating in this study, and also from the parents or guardians of any participating students. After receiving an information package (see Appendices 3 and 4), all participants in focus group or individual interviews completed formal consent documentation, using *pro forma* letters provided by the university's Human Research Ethics Committee (see Appendix 5).

### **Right to privacy**

The following measures were put in place to protect participants from harm and to ensure participants' right to privacy:

1. Confidentiality was ensured through the aggregation of data, and every attempt was made to maintain anonymity, so that individuals could not be identified;
2. An external interviewer was used to conduct staff interviews and focus groups so that staff might speak as freely as possible;
3. The researcher/principal had access only to transcripts of interviews, so that voices could not be recognised on audiotape. Names were deleted by the transcriber whenever used by participants;
4. An external expert carried out the transcription;
5. Tapes of staff focus group interviews were never in the possession of the researcher/principal;
6. After transcription, these tapes were sent by the transcriber to the university and kept in the university supervisor's care;
7. Data were kept on the researcher/principal's laptop computer and backed up onto the school's file server, both of which were password-protected;
8. Paper documents were kept secure in the researcher/principal's home office.

### **Protection from harm**

In this study, the researcher, as the principal of the school, was also the employer of staff and the arbiter of issues involving students and parents. This research involved noting and drawing conclusions about events, values and attitudes based on her observations of the

behaviour, speech and interactions of people within the school. While interviews elicit information about people's values and attitudes, observing actual behaviour, speech and interactions reveals much more, often more than the people observed realise (Bernard, 1995). Staff, students and parents therefore needed to be protected from harm, real or perceived. This was a challenging, but not insurmountable, situation addressed chiefly by the establishment of two separate but connected groups, the Verity Committee and the Critical Panel.

'Verity', a word now seldom used, stems from the IBVM and Mary Ward tradition, and denotes 'integrity and truth, particularly the profound truth of who we are and what gives meaning to our lives, a truth that centres fundamentally on the mystery of God' (Honner, 1998, p.8). The researcher established the Verity Committee in 2002, solely for this research, in order to ensure that integrity might *be*, and *be seen to be*, paramount.

### **The Verity Committee**

Consisting of four staff members, the Verity Committee acted, from 2002 until this study was completed, in the role of 'ombudsman' for the school community in case any member had a concern with aspects of the research. (See Appendix 6 for the Terms of Reference of the Verity Committee.) The researcher/principal invited a former staff union representative, on the basis of her universally perceived integrity, to chair this group. All teaching staff were then invited to self-nominate for membership of the Verity Committee. Since nominations were made to the chair, who then chose the remaining three members of the Committee from nominees, the researcher/principal remained unaware of the identity of all but the three successful nominees. Any staff member who had a concern with aspects of the research process – as opposed to the reinvention process – was encouraged to approach a member of the Verity Committee, which was to meet at least once each term.

By contrast, the purpose of the Critical Panel, as explained below, was to protect the integrity of the research. The chair of the Critical Panel met regularly with members of the Verity Committee, however, to ensure that they could pass on any staff concerns to a person other than the principal. Additional means of protecting participants from potential harm as a result of this study included the use of an external interviewer to conduct many of the interviews; the aggregation of data so that individuals could not be identified; and other mechanisms to provide anonymity and/or confidentiality.

## **Honesty with professional colleagues**

When the researcher is a participant – an insider researcher (Flick, 1998; Gold, 1958; Merriam, 1998) – there is a particular need to demonstrate to the research community that the research findings are trustworthy.

When reporting their [i.e. insider researchers'] research findings to an external audience issues of validity; such as bias and subjectivity and ethical issues; including anonymity and coercion, need to be addressed. (Smyth & Holian, 1999, p.1)

For this study, the establishment and operation of a Critical Panel (see Appendix 7 for Terms of Reference) was a major means of safeguarding the research against possible claims of bias emanating from the researcher's position within the school.

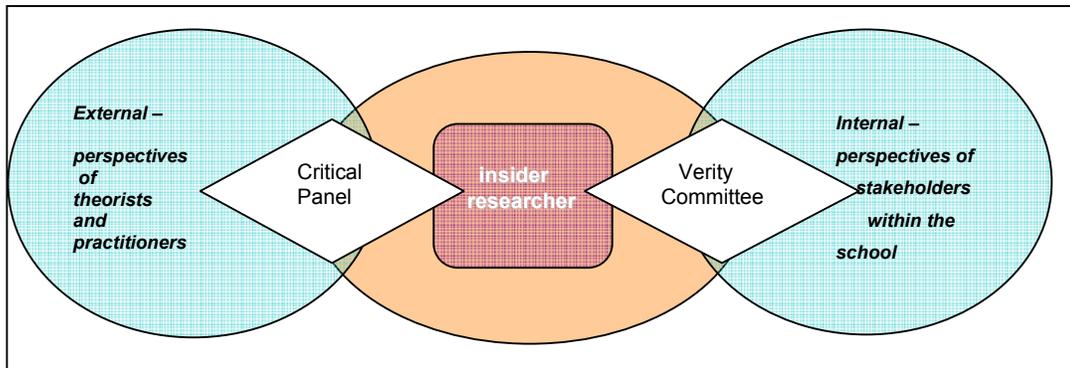
### **The Critical Panel**

The researcher established the Critical Panel in October 2002 in order to incorporate 'outsider' views into the research as a balance to the 'insider' views of the researcher (Hartley & Benington, 2000). This group met at regular intervals to offer a detached view of the integrity of the research methodology, and to provide a further means of ensuring the ethical conduct of the research, in addition to the standard requirements of the university. In short, the Critical Panel's role was to 'keep the researcher honest'. By enquiring about the researcher's choices and reflections, and by challenging her potential 'blind-spots' and assumptions (Smyth & Holian, 1999, p.4), the Critical Panel reinforced the credibility of the research findings for external audiences. Through her regular interaction with the Verity Committee, the chair of the Critical Panel also provided a further measure of protection for participants.

The three members of the Critical Panel –a retired school principal, an academic, and a retired provincial of the Loreto sisters - reflected several perspectives, namely, educational leadership and the world of school; academic research in the field of education; experience in school governance; and the IBVM history and values. Figure 4.1 illustrates the relationship between the researcher, the Verity Committee, the Critical Panel, the school community, and the research community. All three members of the Critical Panel hold doctorates and, together, they brought to the research a critical and analytic perspective. They gained information about the progress of the study and of the reinvention of the school not only through the researcher, but also through the Verity Committee. (See Figure 4.2, the final report of the chair of the Critical Panel.)

Other mechanisms adopted in this study to ensure honesty with professional colleagues included the development and articulation of precise guidelines for the selection of

participants, and adherence to the university's requirements for ethical research. This study met the requirements of the university's Human Research Ethics Committee (see Appendix 18).



**Figure 4.1 The relationship between the researcher and other groups**

In summary, the researcher needed constant input 'from conscience, from stakeholders, and from the research community' (Denzin & Lincoln, 2000b, p.372). The regular structures of the school provided constant input from stakeholders, as did the culture of vigorous debate and challenge among staff, students and parents, and both the university and the Critical Panel provided input on behalf of the research community. Most important of all, however, was the input from conscience, as Stake (2000a, p.447) elaborates:

Qualitative researchers are guests in the private spaces of the world. Their manners should be good and their code of ethics strict...Those whose lives and expressions are portrayed risk exposure and embarrassment, as well as loss of standing, employment, and self-esteem.

In this study, decisions were consistently made, and the design amended, with reference to both the protection of the participants and the trustworthiness of the research data. As the researcher was an 'insider' in the case study organisation, the ethical issues were significant, and so also were other insider researcher issues and challenges.

### SHORT REPORT ON THE CRITICAL PANEL

In order to advise her on minimising the impact of the principal undertaking doctoral studies on the reinvention of the school, the researcher set up a "critical panel".

This panel had the task of monitoring the impact of the actual doctoral studies on the working life of the staff as part of the objectivity and accountability of the participant researcher. It was clearly understood that the comments made should not intrude into the area of advice given by the academic supervisors, with regard to the conduct of the research. Having regard for the context and nature of the project, the researcher sought input that would help safeguard the core values of a Mary Ward school, that would reflect the context of a girls' secondary school and that would be considered academically sound so that the integrity of any advice given would be assured. The following were the members of the panel:

- Sr Noni Mitchell IBVM, a very senior Loreto sister Associate
- Professor Ken Sinclair of the Education Faculty of the University of Sydney
- Dr Ruth Shatford, retired principal of Tara Anglican School for Girls, North Parramatta.

Within the staff, the principal also set up a "verity committee" whose brief was to safeguard the staff from impositions on their work directly attributable to the fact that the reinvention process in which they were engaged, was the subject of the principal's doctoral studies.

The critical panel, through its chair, interacted with the verity committee and could serve as an ombudsman if the staff had grievances. When it was unclear to the verity committee as to whether a grievance should be raised with the principal or with the critical panel, the question was applied: "Would this concern have occurred if the principal had not been using the reinvention process as the material of her doctoral studies?" If the answer was "yes", then the issue was deemed a normal school issue to

be raised by staff with the principal and was not considered a matter for the verity committee. If the answer was "no", the matter should be raised with the critical panel who would then raise it with the principal.

The critical panel met about four times a year, the frequency of meetings being determined by the progress of the work. The usual pattern of agenda was a progress report from the researcher/principal giving an update on staff response to the stage of the reinvention that had been reached, indicating the progress and any difficulties in the collection of data and a general review of significant happenings in the school. Before each meeting, the researcher had circulated the draft of her most recent thesis chapters for the committee to be informed of progress. There was then opportunity for the researcher to raise matters of concern that she was facing and for the panel to reflect on them. The panel also took the opportunity to raise potential issues that they saw possibly arising from the reports they had received. There was free and frank discussion but the panel, mindful of the scope and boundaries of its role, occasionally declined to pursue some discussion, advising the researcher to take those matters up with her supervisors.

With different personal and professional backgrounds and experiences, the panel brought different perspectives that the panel hoped would build in the safeguards the researcher was looking for in setting it up and compositely, a breadth of approach. The researcher always expressed appreciation for the discussion, finding it stimulating and helpful. She was always very open to being questioned and critically appraised and the panel feels it has been able to make a useful contribution to the integrity and comprehensive nature of the research and the way it is written up for the benefit of the wider education community within the terms of its establishment.

Dr Ruth Shatford, Chair, Critical Panel  
28 November 2005

Figure 4.2 Final report of the Chair of the Critical Panel

## ***Insider researcher issues***

### **Participant-as-researcher**

There is relatively little in the literature about researchers who conduct research in their own organisation (Evered & Louis, 1981; Lovat, 2003; Miller, 2002; Nicotera, 1999; Smyth & Holian, 1999), especially researchers who are insiders before, during and after the research has been carried out (Delyser, 2001). The participant-as-researcher is simultaneously involved and detached when in the dual roles of participant and researcher. Merriam (1998, p.103) describes it thus:

Participant observation is a schizophrenic activity in that the researcher usually participates but not to the extent of becoming totally absorbed in the activity. While participating, the researcher tries to stay sufficiently detached to observe and analyse. It is a marginal position and personally difficult to sustain.

### **The multiple roles of this researcher**

In this case study, however, the researcher juggled four roles: those of researcher, principal of the school, change-agent within the school, and human being. The researcher was concurrently leading the school; leading the reinvention process; stepping back from it to observe, record and analyse; and undergoing all the emotions and challenges that these endeavours provoked. This required absorption in the activity of the school, while also maintaining sufficient detachment to analyse both events and data (Smyth & Holian, 1999). An autoethnographic approach (Ellis & Bochner, 2000) enabled these experiences and insights to form part of the data, while a transpersonal approach (Braud & Anderson, 1998; Willis, Smith, & Collins, 2000) assisted the researcher to articulate her own learnings and transformation through the research. These latter learnings were especially important as they had the potential to have a direct impact on the reinvention process and also on how the researcher was perceived as the principal. Chapter 5 elaborates on these issues.

### **Benefits of insider research**

There are, however, a number of benefits of insider research. Forbes (2003, p.10), whose study of holistic education was conducted as an insider (as principal of a holistic school), outlines the benefits of an insider's, or *emic*, perspective:

Studying the activities of an engineer...is not the same as the engineer studying an engine. One must be inside the 'mode of social activity' to understand it.

In this study, the principal/researcher's eleven years' involvement in this case study site enabled a depth of understanding of the issues not accessible to a researcher external to

the site (Evered & Louis, 1981; Hartley & Benington, 2000; Lovat, 2003). She had an intimate knowledge of the culture, history and people of the school, as well as access to particular opportunities, insights and information stemming from her role as principal. Because of this detailed knowledge, and her understanding of the organisational behaviour of the context, the principal/researcher, as 'organisational actor' (Evered & Louis, 1981), was able to offer a unique perspective on the reinvention process (Smyth & Holian, 1999). Yin (2003) also maintains that the viewpoint of someone inside the case study, rather than external to it, is invaluable in producing an 'accurate' portrayal of the case because of this access to particular opportunities, insights and information. This study yielded knowledge that was valid, useful and relevant for the school community, as well as for the wider world of theory and praxis (Smyth & Holian, 1999), and is discussed in ensuing chapters.

Other benefits of being a participant-as-researcher in this case study included:

1. the incorporation into the reinvention process of insights gained by the principal/researcher, as a result of analysis of the literature. This enabled her to understand more fully the culture of the school, processes of change and transition, and theories of leadership;
2. the opportunity for school community members, through focus group and individual interviews, and the working of the Verity Committee, to clarify and articulate their views on aspects of the reinvention;
3. a potential 'Hawthorne effect' (Draper, 2003; Mayo, 1933; Roethlisberger & Dickson, 1939), whereby the very fact of observation can lead to a positive sense of being special and singled out. Members of the school community, aware that they were contributing to educational practice and theory as a result of both the reinvention and the research on the reinvention, could have been positively influenced by this fact. Goetz and LeCompte (1984, p.57) explain, 'the act of measuring or observing affects the action of whatever is being observed or measured'. (This could have positive, but also negative, consequences. For example, participants could have objected to being part of this study, or considered that the study was taking precedence over the reinvention on which it was based); and
4. the opportunity to contribute to the literature and theory on change in schools in a way which combined the insights of both practitioner and theorist (Bassey, 1999).

As well as benefits, there are also, however, a number of challenges and risks associated with insider research.

### **Challenges and risks of insider research**

In line with the observations of Smyth and Holian (1999) and Delyser (2001), this researcher experienced further challenges because of the multiple roles she filled. Initial

comments made by staff in January 2002, when her intention to document and analyse the reinvention process as a formal study was announced, included some which highlighted the modelling of life-long learning, and the benefit to the school (J200201-02). Other comments expressed concern for the pressure the study would put on the principal, and potentially, therefore, on the school community, and one comment referred to the need for people to feel safe in order to be honest.

While overt comments were generally supportive, the last comment cited above confirmed some of the major challenges of this research. It became apparent that some staff viewed the research, and/or the reinvention, with mistrust, suspecting that the reinvention was primarily for the researcher's benefit or that the research findings would be overly biased because she was the principal, an 'insider'. Several research journal entries over the years 2002 to 2004 documented such reactions. Perhaps the greater risk, however, lay in the fact that, as an insider, and in a significant authority position, the researcher might see *too* much. With access to potentially sensitive information, the researcher risked 'exposing previously "undiscussable" issues, disturbing arrangements that serve particular people or purposes' (Smyth & Holian, 1999, p.3). These are discussed in later chapters.

The potential for confusion in the minds of staff over the multiple roles held by the researcher/principal required sensitivity. As Smyth and Holian (1999) caution, when an insider researcher intends to continue working in the organisation after the research is completed, extra care needs to be taken to manage interdependence in working relationships and boundary issues during the research process. In fact, this researcher's continuation in her position within the school was potentially affected by the outcomes of both the reinvention and the research on the reinvention. Smyth and Holian (1999) refer to such potential dangers for researchers who conduct research in their own organisation, especially when they themselves are part of what is being studied (see also Delyser, 2001).

It was the school's values and tradition, and her passionate belief in holistic education, which encouraged the researcher to undertake the risk of conducting research in her own community. Vision for the future and courage in the service of that vision was a characteristic of Mary Ward, and a constant theme in the history of the IBVM, and therefore tied the reinvention to the core values of the school. Such a process was worthy of being studied.

In summary, being an insider researcher studying the reinvention process within her own school offered potential benefits as well as challenges. Table 4.1 lists both the advantages and the challenges that the principal/researcher anticipated or encountered in this insider

research study and outlines the methodological solutions adopted to address the challenges.

<b>Advantages</b>	<b>Challenges</b>	<b>Solutions</b>
The researcher knows the people and the politics in the organisation and can, therefore, interpret more easily what is happening, and why, than could an external researcher (Schein, 1992, p.170).	The researcher is not politically neutral in the organisation. She is part of alliances and networks. This will enable access to information from some sources and prohibit access to others.	Data were collected from all, or a wide range of, participants in order to minimise the risk of skewed data.
The data will be broader, based on the researcher's immersion in the organisation, rather than on one, or a series of, field visits.	The researcher may know too much about the organisation and therefore find it difficult to separate out issues or to conduct research within the organisation without preconceptions and prejudices.	Anonymous surveys were used as one of the means of data collection, thus avoiding face-to-face contact, and therefore increasing the likelihood of honest responses.
An insider may have more credibility in the eyes of participants and be trusted more than someone external to the organisation, who does not know its culture.	Participants may be more comfortable to divulge information to a stranger, with whom there is less fear of potential political consequences, than to an insider.	Mechanisms were established to protect participants from political consequences, such as the Verity Committee and Critical Panel, and use of an external interviewer.
Loyalty to the organisation may lead to participants' being prepared to divulge information to an insider that, out of loyalty to the organisation and its people, they would not share with an outsider.	Participants may not wish to hurt or give offence and therefore withhold negative views. Conversely, participants may wish to cause hurt or gain political advantage through their contribution to the research. This may impact negatively on members of the community, including the researcher.	The researcher acknowledged whatever preconceptions were known to her and established methods of dealing with any unconscious preconceptions, especially through the Critical Panel.
An insider researcher is more likely to be able to link research findings to practice in the organisation.	The research findings may lack credibility within the organisation and/or in the external world of research.	Strong triangulation in data sources and collection methods were used to counterbalance the legitimate, but partial, lens of the researcher.

**Table 4.1 Issues related to insider research**

Table 4.2, which follows, summarises the additional benefits and challenges associated with being an insider researcher in a position of power in the organisation being studied, and offers additional methodological solutions.

<b>Advantages</b>	<b>Challenges</b>	<b>Solutions</b>
The researcher has access to a wide range of participants and information not normally accessible to an external researcher or to an insider without power and authority within the organisation.	<p>Participants may fear for their jobs or promotion opportunities if they do not participate, or express views at odds with those of the researcher.</p> <p>Participants' participation and views may be influenced by the hope of gaining advantage from the researcher.</p> <p>Participants may not wish to hurt or give offence and therefore withhold negative views. Alternatively, participants may wish to cause hurt through the research.</p>	<p>Community members were protected through the establishment of the Verity Committee, an 'ombudsman' body to which participants could report concerns relating to the research.</p> <p>Sound and transparent methods of sample selection were adopted.</p> <p>Data were obtained from all, or a wide range of, participants in order to minimise the risk of skewed data.</p>

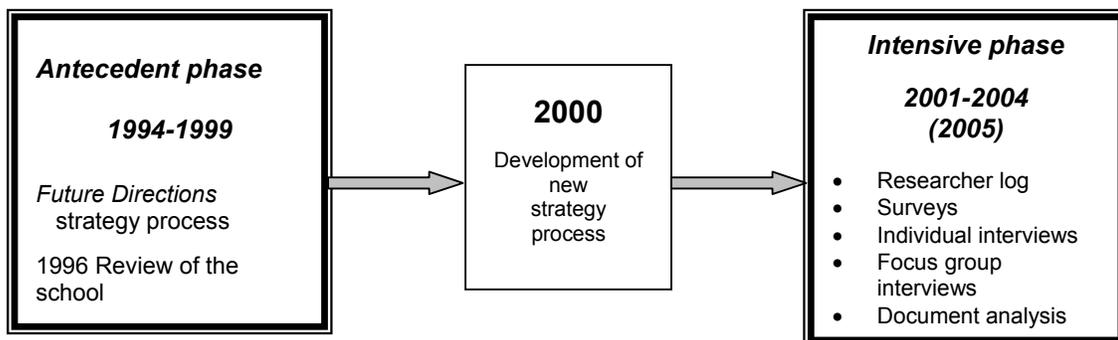
<p>The insider researcher's conceptual framework is likely to be broader than that of an external researcher because, being in a position of power and authority, s/he knows more about the organisation.</p>	<p>The research findings may lack credibility within the organisation and/or in the external world of research as the researcher's objectivity may be questioned.</p>	<p>An external review body (the Critical Panel) was established to ensure credibility of research findings.</p> <p>Strong triangulation in data sources and collection methods was incorporated to minimise skewed data.</p> <p>Use of data generated by others complemented that generated by the researcher.</p>
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**Table 4.2 Issues related to insider research when the researcher is in a position of power in the organisation**

In this study, the chosen research paradigm necessitated considerable reflexivity for the roles of researcher, of principal and of change agent, as well as mechanisms and safeguards to protect both the participants and the research. How these issues were precisely translated into the research design and methodology is now addressed.

### **Data collection**

Methods of data collection for this study included the researcher's journal; surveys; focus group interviews; individual interviews; and documents related to the reinvention. Each of these is described in detail later in this section. The researcher selected and sifted, making constant choices about what to include and what to omit (Miles & Huberman, 1994), in a 'collaborative, ongoing process in which data are interactively negotiated by the researcher and participants' (Morse & Richards, 2002, p.87). Data were selected for this case study in two main phases: an antecedent phase, from 1994 to 2000, and an intensive phase, from 2001 to 2004 (see Figure 4.3 and Appendix 8), with some additional data from 2005 also included. While the antecedents of the case extend back to the origins of Catholic Christianity and Mary Ward's 17<sup>th</sup> century philosophy, they dated more particularly from 1994, when the first lay principal (this researcher) arrived at Loreto Normanhurst and the first strategic plan (*Future Directions 1994-1999*) was developed and implemented. The antecedents also included 2000, when planning for the new strategy process took place, as discussed in Chapter 2.



**Figure 4.3 Phases in the data selection**

Data on the antecedents were collected from documents and archival material, as well as from IBVM sisters, and parents with children in the school from 1994 until 2004. The intensive phase of data selection covered the period from 2001, when the new direction for the school was developed through the 2001-2007 strategy process, and concluded in 2004, when the new paradigm of schooling, called the Loreto Normanhurst Student Growth Model (LNSGM) and discussed in Chapter 6, had been implemented for one year with the Year 7 cohort. 2004, therefore, constituted a logical stopping point in an ongoing process of reinvention, through which it was intended to institutionalise learning and innovation in the school community (Schein, 1992). Some important additional data were also included from 2005, the second year of implementation, during the process of final data analysis and writing up of the study.

Several data sources were used in the intensive phase, and these are explained in detail later in this chapter. A data collection schedule, which details how, why, when and from whom data were to be collected, is included as Appendix 8. This schedule was presented to the Leadership Team, the School Council, the Verity Committee and the Critical Panel at the end of 2003, before being emailed to all staff for comment. No concerns with regard to this schedule were presented to the researcher or to the Verity Committee.

At this point, it is important to explain the rationale for the decisions on which participants to include, details of how data were obtained, and why particular methods were used. Since, as discussed earlier, qualitative case study relies heavily on the perspectives and 'voices' of participants (Hackmann, 2002; Hayes & Flannery, 2000; Lather, 1991; Lather & Smithies, 1997; Needham, 2003; Neil, Carlisle, Knipe, & McEwen, 2001; Rogers & Dantley, 2001; Sergiovanni, 2000; Willis et al., 2000), the selection of participants impacts significantly on which perspectives are included and which voices heard.

### **Sample selection**

In this case study, thousands of people were stakeholders, within many different sectors of the school community: for example, Year 7 students experiencing the new learning paradigm in 2004; IBVM sisters; parents who were part of the school throughout the time of the case study and its antecedents; and staff who were recent arrivals to the school. In some instances, whole populations were offered the opportunity to contribute data through surveys. In other instances, sampling was necessary to manage the amount of data, to control for distortion and bias, and to ensure that the views of different segments of the case study population were included in a representative way (Leedy & Ormrod, 2001).

A range of sampling techniques was used. Purposive sampling, in which participants were selected for the particular insights they offered (Merriam, 1998), was adopted in some

instances. Elsewhere, probability sampling, which was representative of larger populations, and therefore enhanced the trustworthiness of the study (Bernard, 1995; Leedy & Ormrod, 2001), was employed. Within these larger populations, stratified random sampling techniques were used, as is explained later.

Care was needed to protect the research from the potential charge of bias in the selection of participants. For this reason, the researcher established clear criteria for selection of focus group members (see Appendix 9), but did not select members of focus groups herself when stratified random samples were used. The registrar (enrolment officer), who had access to a wide range of details about students and their families, and another staff member, with experience in sampling techniques, selected parent and student focus group members using stratified sampling techniques, so that proportional representation of various groups and perspectives (e.g. boarder parents *c.f.* day student parents) was achieved. Together, the chairs of the Verity Committee and the Critical Panel selected staff focus group members in accordance with the researcher's criteria. Table 4.3 (a detail from Appendix 8) illustrates how sampling was used to gain the views of particular groups of parents, staff and others. The rationale for sampling the various school community groups in this manner is explained below.

Staff	Students	Parents	School Council
<ol style="list-style-type: none"> <li>1. all staff who wished to contribute</li> <li>2. teaching staff (stratified random sample of volunteers)</li> <li>3. non-teaching staff (stratified random sample of volunteers)</li> <li>4. Implementation Team</li> <li>5. Year 7 2004 Team</li> <li>6. Strategy Core Team 2003</li> <li>7. Registrar</li> <li>8. Director of Administration</li> </ol>	<ol style="list-style-type: none"> <li>1. all Year 12 2003 students</li> <li>2. students from Years 8 -12 2004 (stratified random selection of volunteers + student focus group leaders from 2003)</li> <li>3. students from Year 7 2004 (stratified random selection of volunteers)</li> </ol>	<ol style="list-style-type: none"> <li>1. all parents of students in Year 7,10 and 12 2003</li> <li>2. P&amp; F executive 2002-2004 (all members who wished to participate)</li> <li>3. parents with children in the school from 1994 to 2003 (stratified random sample of all volunteer parents who meet this criterion)</li> <li>4. parents of Year 7 2004 (stratified random sample of volunteers)</li> </ol>	<p>all members of the 2004 Loreto Normanhurst School Council</p>

Strategy Team	Loreto sisters (IBVM)	External Strategy process facilitator (AD)
<p>All members. The Strategy Team was established at the end of 2000 with a membership of 17 people. In 2004 it consisted of 23 people: the eleven members of the school's Leadership Team and representatives of parents, past parents, ex-students, IBVM, Council, and both teaching and non-teaching staff. In 2001 and 2002 it was a decision-making body; however, from 2003 it became advisory to the reinvention process. Since 2000 there was considerable turnover of membership: the previous IBVM member died, external pressures affected others, causing their resignation from the Team, and others still left the school or the Council.</p>	<ol style="list-style-type: none"> <li>1. Director of the Loreto Education Office. It is through this Office, established in the late 1990s, that the IBVM administer and oversee the work of their schools in Australia.</li> <li>2. IBVM member (included within the Strategy Team)</li> <li>3. IBVM member (included within the Critical Panel)</li> </ol>	<p>External facilitator to the Strategy process AD, appointed in September 2000, worked with the school on an ongoing consultancy basis.</p>

**Table 4.3 Sampling of sectors within the school community**

## **Parents**

Parent perspectives were obtained through the following methods:

1. Each year the school surveyed all parents with daughters in Year 7, 10 or 12, as part of an annual Community Satisfaction study. These school-based data were used as part of this study;
2. All members of the 2003 - 2004 Parent Association executive (12 people) were included, representing the views of parents generally;
3. Parents with daughters in the school between 1994 and 2004 had experienced the changes within the school from the start of the antecedents to the case study time frame boundaries and, therefore, had a longitudinal perspective. Of the thirty families in this category, ten participants were selected to be part of a focus group interview. The selection was based on gender balance, proportional inclusion of boarder parents, and geographic distribution of parents of day students; and
4. Similarly, ten parents of students in Year 7 2004 were selected for another focus group interview, with the selection based on gender balance, proportional inclusion of boarder parents, geographic distribution of parents of day students and the range of academic ability of their daughters. The last criterion was included in order to determine whether the LNSGM was perceived to be better suited to students of any particular ability level more than another. Selection according to this last criterion was based on parent nomination on enrolment applications and on students' performance in diagnostic tests prior to their entry into the school.

Overall, this group had the most at stake, as their children were the first to experience the new educational paradigm. Although their Year 7 daughters had been in the school for only one term at the time of data collection, this group of parents had had many contacts with the school prior to their daughters' starting at Loreto Normanhurst. These contact opportunities included three information sessions, Open Days, a family enrolment interview, and the first plenary meeting which they and their daughter had with the daughter's future advisor in November 2003. Some also had older daughters at Loreto Normanhurst, or at other schools, and thus had a basis for comparison.

## **Students**

The views of students were accessed through two focus group interviews: one of ten Year 7 2004 students and the other of ten students across Years 8-12. Stratified random samples were used to select the ten participants for each group. Selection was based on proportional inclusion of boarders, geographic distribution of day students, and range of academic ability. The Year 7 group had a balance of eldest daughters, whose views were likely to be formed mainly by their own impressions, and younger siblings, who already had

experience of the school through an older sister prior to their own arrival at the school. The Years 8-12 group had a balance of students with a sister in Year 7 2004 and those who did not. Fifty per cent of this group had been trained as focus group leaders in 2003 and had subsequently conducted a focus group on the Loreto Normanhurst Student Growth Model with peer students. These students were therefore likely to be more informed, to have a considered opinion, and be better able to reflect the views of other students. Student voice was also included by means of a wide range of surveys, workshop feedback and focus group interviews conducted between 2000 and 2004, as a regular part of school life.

### **Staff**

There were more strategies for collecting the views of staff than for any other group of stakeholders. This reflected the pivotal role played by staff, especially teachers, in the reinvention process. Apart from the survey offered to all staff at the start of 2004, the views of staff were sought through many purposive samples from:

1. the Implementation Team, a group of ten volunteer teachers, established at the end of 2002 to plan the details of the strategy process, particularly the development of Student Growth Plans (see Chapter 6), and disbanded at the end of 2003;
2. the Year 7 2004 Team, formed from volunteer teachers in May 2003. Its members created the inaugural Student Growth Plans and Integrated learning programs for Year 7 2004, which was a significant part of the reinvention;
3. all (four) members of the Strategy Core Team, except the principal. This team was responsible for strategy process and communication between 2001 and the start of 2004;
4. a stratified random sample of ten teaching staff who volunteered to be involved in the research. Selection was based on a range of criteria (see Appendix 9);
5. a stratified random sample of ten non-teaching staff who volunteered to be involved in the research. Selection was based on a range of criteria (see Appendix 9);
6. an individual interview with the registrar, who had significant formal and informal contact with the current parent body, local community and prospective parents; and
7. an individual interview with the Director of Administration, whose role included Human Resources. She was aware, through her conduct of exit interviews and surveys, of why staff left and why new staff were attracted to apply for positions at the school.

In the case of the last two participants, it was not possible to preserve anonymity. Despite this, both participants consented to be interviewed.

## **Other groups**

A range of other groups and individuals impacted significantly on this school, including the Loreto sisters, the owners of the school; the governing body, the Loreto Normanhurst School Council; and others with key roles in the reinvention process. The following list describes the respective roles of these other groups and individuals, and why they provided important perspectives to this study:

1. the IBVM sister who directed the Loreto Education Office. As the carriers of the charism of Mary Ward, present-day Loreto sisters have a major concern for the values of the school, and the type of education it offers. The Director of the Loreto Education Office is the Loreto sister with the closest connection to all the education works of the Institute in Australia. As the owners of the school, the Loreto sisters exercise control over it, through the School Council, the governing body;
2. the School Council, which is responsible for ensuring that the school's core values were upheld and for its ongoing financial health and viability;
3. the Strategy Team, which was established at the end of 2000 with a membership of seventeen people. In 2004 this team consisted of twenty-three people: the eleven members of the school's Leadership Team, representatives of parents, past parents, ex-students, IBVM, School Council, and both teaching and non-teaching staff. In 2001 and 2002 it was a decision-making body, whereas from 2003, after the school's direction had been determined, it was advisory to the reinvention process; and
4. the external strategy process facilitator, employed since the end of 2000, who brought a degree of objectivity, while being closely involved with the process, particularly in 2001. He worked chiefly with business organisations, and also with one other school, and, therefore, had the opportunity to compare processes and effects.

## **Methods of data collection**

As stated earlier, data for this study were generated in two phases: an antecedent phase, particularly between 1994 and 1999, and an intensive phase from 2001 to 2004. Data on the antecedents were collected from documents and archival material, as well as from interviews with particular individuals and groups within the school community. Several data sources were used in the intensive phase: a researcher journal; surveys; focus group and individual interviews (with the use of an external interviewer to conduct staff interviews); and documents associated with the reinvention (Merriam, 1998; Wolcott, 1988; Yin, 2003). While data were generated specifically for this research, use was also made of data generated in the normal running of the school. Details of each data source follow.

## Researcher journal

The researcher recorded what happened in the process of reinvention, together with her own insights, reactions and explanations, over almost four years in a digitally-maintained journal. This journal assisted a reflexive approach (Goetz & LeCompte, 1984; Walford, 2001). Constant review of the evolution of her ideas and reflection on events that occurred, and why particular decisions were made or not made, was a means by which the researcher achieved awareness of her assumptions (Smyth & Holian, 1999).

Bernard's (1995) technique of creating three types of observation journal was adopted at first. This involved *methodological notes* dealing with technique in data collection and about the researcher's own growth as an instrument; *descriptive notes* from watching and listening carefully; and *analytic notes* in which emerging patterns and themes were recorded. This was soon found to be unwieldy and abandoned in favour of a single journal, with researcher insights and reactions differentiated from description of events and context by changes in font and/or colour. This journal was begun in May 2001, with some entries pertaining to the start of 2001 retrospectively added, and was continued until the end of 2004. It was saved first as a series of Word documents, but from April 2003 the journal was written directly into NVivo software. (See Figure 4.4 for a brief excerpt.)

**14 October 2002 First day of Term 4**

**Taskforce of 10**  
This group met with Y, X, W and me during periods 5 and 6. We provided feedback from the staff meeting in the last week of term, asked for clarification eg of advisory groups, and a sense of forward direction. I outlined the ideas that Y and I had had in the holidays i.e. for task forces to work on aspects of the further development eg timetable, roles etc. Good discussion, with some concerns raised:

- the group had not been forewarned that they would be presenting back to staff
- they would have liked feedback from the last week of term
- concern at splitting up the next stage of development into separate task forces for fear of losing the holistic approach
- concern at the dilemma for people on task forces...could they never get off it?

We determined that the task force would meet in the Strategy Core Team time tomorrow.

**Figure 4.4 Excerpt from researcher journal**

## Surveys

An anonymous survey (see Appendix 10) was provided for all staff members present on the first day of the 2004 school year, and time was allocated for immediate completion. Gathering data from all staff through a survey at the outset of the intensive phase of data collection enabled identification of ideas and issues which could be explored in the individual and focus group interviews which were to follow. Other advantages of this survey were that the views of all staff members could be included in the data; and it also

ensured more objectivity and anonymity than individual or focus group interviews permitted (Cohen et al., 2000).

Members of the Verity Committee administered the survey, and the researcher/principal left the room to enable maximum privacy for staff. All staff were made aware that completion of the survey was voluntary. They were requested to hand in their surveys to a member of the Verity Committee rather than remove them from the room, as removal would reduce the likelihood of return of responses; and immediate completion would ensure that individuals' responses would not be affected by staff room discussion. One hundred and seven survey instruments were returned at least partially completed, and a further 23 were returned uncompleted. At the same time that survey instruments were distributed, all staff present were provided with an expression of interest *pro forma* (see Appendix 11) to complete if they were prepared to be a volunteer in a focus group interview of staff at a later date. Members of the Verity Committee collected these, separately from the survey instruments. It was from these volunteer staff members that the focus groups of teaching and non-teaching staff were formed by the chairs of the Verity Committee and Critical Panel, working together according to predetermined criteria (see Appendix 9).

A sheet attached to the front of the staff survey instrument requested demographic data (see Appendix 10). This information from each participant, such as sector of staff, gender, and approximate length of employment in the school was deemed to be useful for analysis. In prior consultation with the Verity Committee, it was thought that the categories of this demographic data would be sufficiently broad to protect the identity of respondents. Nevertheless, three staff members (whose identities remain unknown to the researcher/principal) expressed concern to the chair of the Verity Committee that their identity might be deduced through the demographic data. All were offered the chance, through the chair of the Verity Committee, to withdraw their survey response or to have the demographic data sheet removed, but all three decided to have their responses remain as part of the data, with the demographic data sheet intact.

### **Focus group interviews**

The term 'focus group' describes a group interview in which the researcher asks very specific questions about a topic after having already completed considerable research (Fontana & Frey, 2000). There were several reasons for choosing to conduct focus group interviews as part of this study: they produced rich data, assisting the researcher in interpreting what she had observed; they also empowered participants to speak their views within a supportive group and aided recall (Fontana & Frey, 2000; Madriz, 2000). Methodologically, the focus group interviews were seen as useful for accessing

phenomenological data and for triangulating and testing data collected from other sources and by other methods, such as surveys and the researcher journal (Fontana & Frey, 2000).

In this study, eleven focus group interviews were conducted between 8 February and 1 April 2004, in the first term of the implementation of the new paradigm of schooling, the Loreto Normanhurst Student Growth Model, a major aspect of the reinvention. The size of focus groups was normally ten people but, in the case of the Strategy Team, included twenty people. These interviews generally lasted one hour, but ranged from forty-five to ninety minutes. The questions used were based on the same questions asked in the staff survey, thus providing the opportunity to confirm or disconfirm the survey data (Stake, 1995). However, the questions were adapted to allow both for variations between the different populations in the focus groups, and for emerging areas of discussion within and between groups, as is the usual procedure for this method of data collection (Kitzinger & Barbour, 1999).

The researcher/principal conducted six of the eleven focus group interviews in this study: those which involved parents, students, and the School Council. They were semi-structured, based on questions related to the research questions, but the intention was to probe and explore issues raised by participants. The original intention, in order to provide a safe space for staff, was that a member of the Leadership Team, rather than the researcher, would conduct staff focus group interviews, with the researcher present to make notes and observe interaction. This plan was changed, as it was felt that staff either could not or would not be open if a member of the Leadership Team conducted these sessions, and if the researcher/principal were present. Therefore, in order to provide confidentiality to staff and to assist openness in what was discussed, an external interviewer - a retired academic from a local university (but not the university through which this study was completed) - was used to conduct all staff focus group and individual interviews, and also the Strategy Team focus group interview.

The views expressed in transcripts of staff focus group interviews tended to be negative, whereas data from staff surveys were generally more balanced. There are several possible interpretations of this divergence in the data, one of which was the timing of the focus group interviews. Whereas the staff survey was conducted at the start of 2004, at the very beginning of the school year, the focus group interviews of staff took place a month later, when an implementation dip (Fullan, 2001) was being experienced.

The conclusion drawn by this researcher is that, while focus group interviews can be a valuable vehicle for data collection, with the interaction between participants often prompting recollections or inspiring new insights, there can also be drawbacks in using

focus group interviews. As for individual interviews, people's recollections can vary with the day, or the moment, as each person has many 'selves' (Lather, 1991). Morse and Richards (2002, p.99) suggest that interviews such as those in this study 'should be judged not in terms of the accuracy of the actual event but in terms of the accuracy of the participants' recall of *how they felt or experienced or perceived the event at the time*' (italics in the original). Participants' experiences are seldom wholly positive or wholly negative, but which memories are selected can be influenced by one's own political agenda, or that of influential members of the group.

One theory, proposed by a member of the Strategy Team with significant corporate strategy experience (KI-06), is that in situations which are politically charged, such as work groups, one can expect data to be polarised. Participants will take advantage of the opportunity to express strong support for or antipathy towards the issue at stake, hoping for political advantage for either the issue or the people involved. In this study, there were complicating factors. Apart from the fact that members of focus groups had to continue working with each other afterwards, ethical considerations associated with the position of the researcher/principal in the school meant that random selection of staff was considered not desirable, and the focus group members were therefore all volunteers. This may well have skewed the data and may partially explain the negative views expressed in staff focus interview groups.

While data from all focus group interviews proved useful to the principal/researcher in addressing some issues in the reinvention process, the views of staff as a whole were represented in a more balanced way by the data from staff surveys, which identified both positive and negative aspects of the reinvention process. The triangulation achieved by gathering data through a range of methods, as outlined later in this chapter, enhanced the validity of the conclusions drawn from the study. A further method of data collection, particularly valuable for key informants with unique perspectives and special knowledge to contribute (Goetz & LeCompte, 1984), was the conduct of individual interviews.

### **Individual interviews**

Individual interviews were conducted with eight participants, each of whom had a particular perspective on the reinvention process, as described earlier in this chapter. Four members of the Strategy Core Team, the school's Director of Administration, the external strategy process facilitator, and the IBVM sister who was the director of the Australian Loreto Education Office were interviewed. The researcher conducted the last two of these interviews, and the remainder were conducted by the external interviewer. A 'standardised open-ended interview' (Cohen et al., 2000) style was adopted, in which the exact process

and sequence were determined in advance for all interviewees (see Appendix 12 for an example), although the exploration of particular areas in greater depth was encouraged.

All individual and focus group interviews were tape-recorded and transcribed. Fortunately, the researcher made a trial recording with the equipment before any interviews were conducted. The machine was set at the wrong speed, which completely distorted the voices, and would have resulted in unusable data had the setting not been altered. During recording of the interviews, no attempt was made to identify individual speakers, with the exception of the interviewer. In the transcription, each new speaker in the focus group was indicated by a new paragraph. This was not ideal. Because the identity of speakers was not known, no conclusions could be drawn about the context from which a participant was speaking, and non-verbal data were absent, making conversation analysis and discourse analysis too difficult to undertake (Miles & Huberman, 1994; Silverman, 2000). This course of action was necessary, however, in order to protect confidentiality. For the same reason, the researcher/principal had no access to the tapes of focus group and individual interviews conducted by the external interviewer. All tapes were posted to the professional transcriber, who emailed digital versions of the each transcript to the researcher, and then posted the tapes directly to the university.

### **Documents**

Data which formed part of the regular life of the school were included wherever relevant. As described earlier, each year the school conducted anonymous surveys of all parents with daughters in Years 7, 10 or 12, with a précis of the ensuing report publicly available on the school's website. Annual anonymous surveys of all staff, and exit surveys of Year 12 students and staff leaving, were also conducted. Questions relating to the reinvention process were included in all these survey instruments, the analysis of which was undertaken by a member of the Leadership Team. Minutes of meetings; a Gantt chart of process and progress kept by the Director of Administration (see Appendix 14); PowerPoint presentations for a range of audiences; building plans; school publications; and email communications related to the reinvention process also constituted data for this study.

The gathering of data for this study would have been a pointless exercise, however, unless it could be trusted and the research on which it was based was credible and, to some extent, able to be applied to other contexts. The researcher/principal sought to establish the credibility, trustworthiness and transferability of this study by means of a range of processes and strategies.

## **Data Analysis**

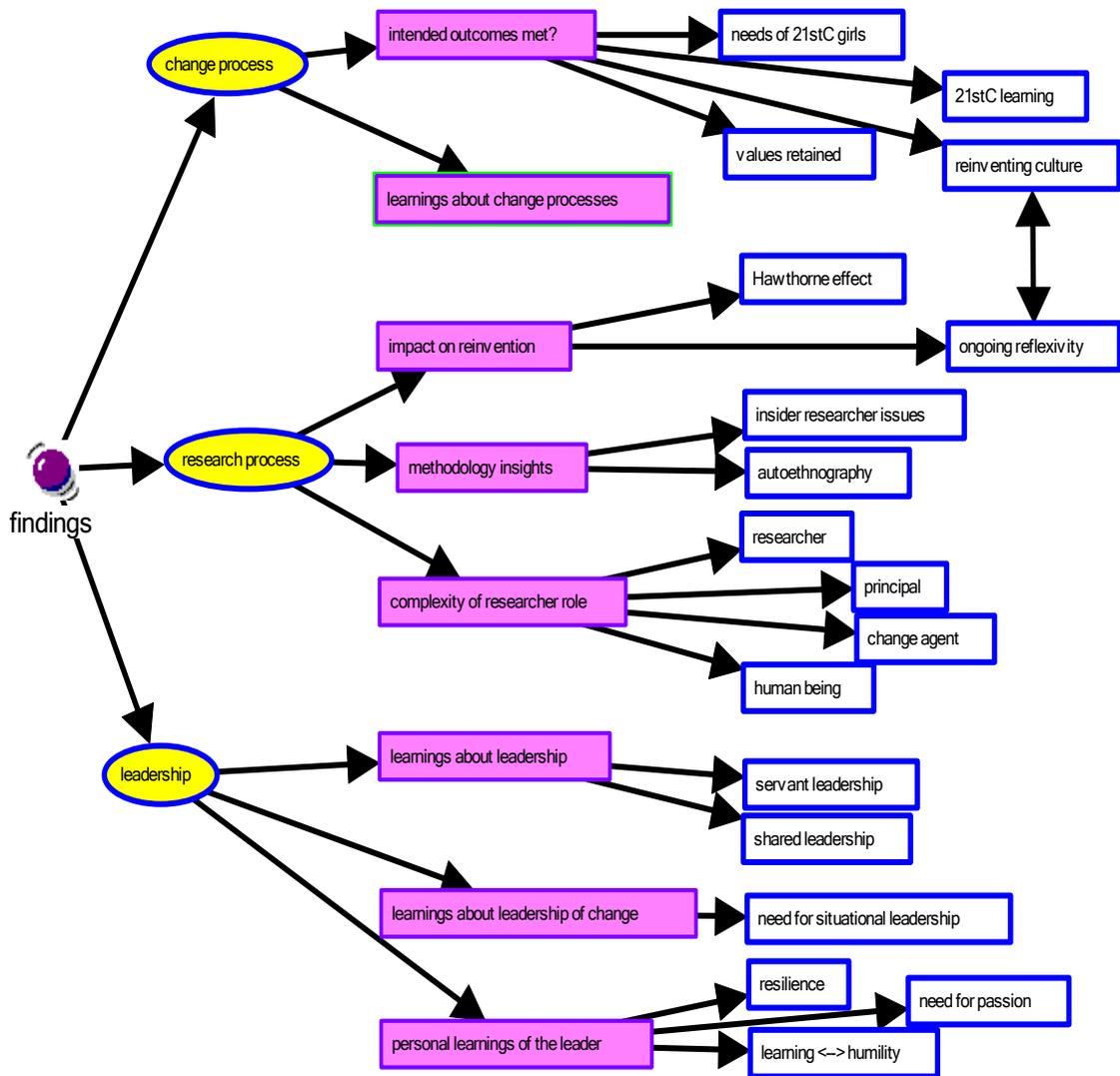
Qualitative analysis - in fact, all analysis - is the search for patterns in data and for ideas that help explain the existence of those patterns (Bernard, 1995). Conclusions did not 'emerge' from the data; rather, the researcher interpreted the data. Constant comparative analysis, the process of taking information from data collection and comparing it to emerging categories or themes (Cohen et al., 2000; Creswell, 1998; Maykut & Morehouse, 1994; Merriam, 1998) was used to analyse data in this study.

*NVivo* software was used to organise and manipulate the large amounts of data that were generated. Use of such technology can be risky if a regular discipline of saving and backing up data is not followed. In July 2005, when electrical power was interrupted during an auto-save, the data for the whole study was rendered unusable. Fortunately, a recent backup could be accessed. While *NVivo* was useful in storing and manipulating data, it was the researcher's task, however, to abstract and draw conclusions from the unstructured masses of data from the study. Coding techniques were used to identify emerging patterns and themes (Bernard, 1995; Merriam, 1988; Miles & Huberman, 1994; Morse & Richards, 2002).

### **Coding**

A conceptual framework derived from an analysis of literature relevant for this case study (see Chapter 3) formed the basis for developing initial codes, using the modelling tool in *NVivo*. As Walford (2001) explains, model-building is a straightforward way of explaining what is occurring when theory is used: models, or conceptual frameworks, are essentially simplifications of complex realities. In this study, there were several iterations of models developed to illustrate the themes and patterns interpreted by the researcher from the data. Figure 4.5 presents an early model of findings developed within *NVivo*. A simplified final model of the findings is presented in Chapter 9, and a fuller version appears as Appendix 17.

Coding was delayed until after data from participants had been collected. Otherwise, codes would have been established from the participant-as-researcher's own reflections, with the ensuing danger that other participants' data may have been forced into a pre-existing coding system that did not fit well enough. Bazeley and Richards (2000, p.55) warn that 'the first documents coded will strongly influence the categories developed to capture that thinking.'



**Figure 4.5 Model of findings, July 2003**

The following steps were involved in the analysis of data in this study. The researcher/principal:

1. read through the data and looked for themes emerging, based on the concepts in the conceptual framework;
2. developed further insights from data within these themes;
3. developed codes and code trees based on themes and insights from the data (see Table 4.4 and Appendix 13 for samples). These codes were frequently modified in the early stages of analysis, which explains the differences between these excerpts;
4. checked these codes with peers;
5. applied the codes to the data using *NVivo* software, coding sections of text and modifying codes as the interpretation of the data dictated;

6. checked for inconsistencies, plausibility and lack of coherence in data and emerging themes; and
7. wrote about the themes and insights, making assertions, using coded extracts to substantiate these.

### **NODE LISTING 15 July 2004**

**Nodes in Set:** All Tree Nodes

**Created:** 6/07/2004 - 10:51:36 PM

**Modified:** 15/07/2004 - 2:45:00 PM

**Number of Nodes:** 44

- 7      **(5) /change**
- 8      (5 1) /change/change process
- 9      (5 11) /change/impact on staff~students
- 10     **(6) /findings**
- 11     **(7) /indicators~outcomes**
- 12     (7 1) /indicators~outcomes/student growth model
- 13     (7 3) /indicators~outcomes/needs of 21stC girls met~
- 14     (7 5) /indicators~outcomes/21st C learning needs met~
- 15     (7 6) /indicators~outcomes/too early to tell
- 16     (7 7) /indicators~outcomes/capacity building
- 17     **(8) /players**
- 18     (8 1) /players/external facilitator
- 19     (8 2) /players/principal
- 20     (8 3) /players/leadership team
- 21     (8 5) /players/parents
- 22     (8 6) /players/students
- 23     (8 7) /players/School Council~ IBVM
- 24     (8 23) /players/'I'
- 25     (8 24) /players/staff
- 26     **(9) /impact~ personal responses**
- 27     (9 1) /impact~ personal responses/positive

### **NODE LISTING 9 July 2005**

**Nodes in Set:** All Nodes

**Created:** 20/11/2004 - 6:24:31 PM

**Modified:** 9/07/2005 - 8:09:46 PM

**Number of Nodes:** 208

- 13     (1) /change process
- 14     (1 1) /change process/learnings about change processes
- 15     (1 1 1) /change process/learnings about change processes/inclusivity
- 16     (1 1 2) /change process/learnings about change processes/communication
- 17     (1 1 3) /change process/learnings about change processes/political issues
- 18     (1 1 4) /change process/learnings about change processes/reflectiveness
- 19     (1 1 5) /change process/learnings about change processes/I just want to teach
- 20     (1 1 6) /change process/learnings about change processes/transition issues
- 21     (1 2) /change process/intended outcomes met~
- 22     (1 2 1) /change process/intended outcomes met~/needs of 21stC girls
- 23     (1 2 1 1) /change process/intended outcomes met~/needs of 21stC girls/identity
- 24     (1 2 1 2) /change process/intended outcomes met~/needs of 21stC girls/supportive relationships
- 25     (1 2 2) /change process/intended outcomes met~/21stC learning
- 26     (1 2 2 1) /change process/intended outcomes met~/21stC learning/emotional intelligence

27	(1 2 2 2) /change process/intended outcomes met~/21stC learning/information literacy
28	(1 2 2 3) /change process/intended outcomes met~/21stC learning/ICT skills
29	(1 2 2 4) /change process/intended outcomes met~/21stC learning/academic outcomes met
30	(1 2 3) /change process/intended outcomes met~/values retained
31	(1 2 3 1) /change process/intended outcomes met~/values retained/Mary Ward values
32	(1 2 3 2) /change process/intended outcomes met~/values retained/Catholic Christian values
33	(1 2 3 3) /change process/intended outcomes met~/values retained/espoused vs lived
34	(1 3) /change process/unintended outcomes

**Table 4.4 Excerpts from two of the code trees lists made for this study**

As Table 4.4 and Appendix 13 illustrate, from the documents imported into *NVivo* as data for this study, a system of codes was developed to denote themes within the data. This system involved individual codes or ‘nodes’ as well as nodes in ‘sibling’ or ‘child’ relationships to each other (Bazeley & Richards, 2000), and organised into ‘trees’. Documents were coded using this system, so that data related to particular themes or patterns could be grouped together and analysed. The process of analysis of the data in this study involved several iterations of coding systems, within which trees of nodes were added, removed or incorporated into other trees.

The series of steps in analysis of the data was similar to Creswell’s (1998, p.143) data analysis spiral, which moves from raw data, through the steps of organisation, perusal, classification, and synthesis to the final report. The volume of data in this study was massive both in breadth and the amount of time it covered, however. For example, just one month of the 2003 researcher journal converted into eighty pages of a Word document. Many coding frameworks were attempted, using *NVivo* and guided by the question, ‘How can I tell this story in a clear and coherent way?’ Ultimately, the researcher abandoned the individual coding of the full text of each document and made use of the search tool in *NVivo*. Having digested the data well, she was able to support, or challenge, her developing theories and assertions with data extracted by means of the search function. In a similar way, the search function in the bibliographic software *Endnote* proved useful. Because care had been taken in entering the details of over one thousand items of literature, the researcher was able to extract and recall literature on any aspect of this study and use it to confirm (or disconfirm) her emerging conclusions.

#### **Coding of documents and data sources**

A system for coding documents was developed for ease of reference in the writing up of this study. Each document (for example, an interview transcript or individual staff survey response) was imported directly, or as a proxy document (Bazeley & Richards, 2000), into *NVivo* and given a reference code. When a document is cited as a reference, this code is

used. Table 4.5 provides a sample of the researcher’s system of document coding, and a full list of abbreviations and codes is provided in the Glossary section after Chapter 9.

Type of document or data source	Code	Example	Explanation
Researcher journal entry	J	J200101-02 J200305	Journal entry from 2001, January – February Journal entry from 2003, May
Individual interview	II	II07	#7 of 8 individual interview transcripts
Focus group interview	IF	IF02	#2 of 11 focus group interview transcripts
Change process document	ChP	ChP05	Members of task forces 2001-2003
Critical Panel notes/minutes	Critical Panel	CP09	Critical Panel minutes, 18 August 2003
Document relating to evaluation	EV	EV05	Report of 2004 school evaluation of implementation of Loreto Normanhurst Student Growth Model
Key informant	KI	KI-08	Key informant #8, from a total of 41 key informants

**Table 4.5 Coding of documents in this study**

### **Coding within documents**

Staff survey responses were coded according to the sector of staff of the respondent and also by number. For example, ‘T’ denoted a teacher response; ‘LT’ a response from a member of the Leadership Team; ‘HoD/HC’ a response from a middle manager, either a Head of Department or a House Coordinator; ‘S’ denoted a Support staff response; and ‘B’ a response from a member of the boarding staff.

## ***Credibility, Trustworthiness and Transferability***

There is no single ‘correct’ interpretation of the data in qualitative research (Wolcott, 1990). Rather, the researcher’s interpretation ‘helps us make sense of the world in a particular way [through the organisation of] the undisciplined confusion of events and the experiences of those who participate in those events as they occur in natural settings’ (Morse & Richards, 2002, p.5). Qualitative enquiry is therefore subjective, interpretive, and time and context bound, as well as holistic, multidimensional, and ever-changing (Merriam, 1998.). Nevertheless, the researcher must establish the credibility, trustworthiness and transferability of the findings and conclusions of the study (Denzin & Lincoln, 2000a).

### **Credibility**

Merriam (1998) suggests six strategies for establishing credibility: triangulation, member checks, long-term observation, peer examination, participatory or collaborative modes of research, and clarification of the researcher’s biases. Leedy (2001) adds two others: thick description and negative case analysis, which Yin (2003) refers to as addressing rival explanations. All eight strategies were employed in order that there can be confidence in the conduct of this study and its assertions (Stake, 1995):

1. Member checks. The researcher's draft conclusions were shared with the Critical Panel, and informally with the Leadership Team, and with the chair of the Verity Committee;
2. Long-term observation. The researcher was a member of the case study school community for over eleven years, and was actively engaged in observing, gathering and interpreting the data for almost five years;
3. Peer examination. The opinion of the Critical Panel was sought on a number of issues, including the boundaries of the research, sampling rationale and methodology, data collection methods, plausibility of the researcher's interpretations, findings and assertions;
4. Participatory or collaborative modes of research. Members of the Verity Committee and the Leadership Team, together with the Critical Panel, were consulted and involved in all phases of the research and a wide range of school community members contributed data;
5. Clarification of the researcher's biases. This issue was discussed earlier in this chapter;
6. Thick description. The researcher attempted to describe the situation in sufficiently rich detail that readers can follow the audit trail and draw their own conclusions;
7. Negative case analysis. The researcher continually sought to understand and find patterns in apparently inconsistent data rather than removing or discounting data that did not 'fit' developing theories; and
8. Triangulation. Since any element of interaction - time, rules, relationships, objects, characteristics, observers and observed - can cause distortion (Denzin, 1989), the trustworthiness of the data in this research was enhanced by triangulation. This term draws on the metaphor of the surveyor's practice of making sightings from two known points to a third (Morse & Richards, 2002). By means of a combination of multiple methodological practices, empirical materials, perspectives, and observers, rigour, depth, complexity and richness was added to the study (Denzin & Lincoln, 2000b; Stake, 2000a).

Several forms of triangulation - methodological, data sources, investigator and theory triangulation – were incorporated (Denzin, 1989), as outlined in Table 4.6. They prevented the too-ready acceptance of initial impressions and assisted in correcting biases (Goetz & LeCompte, 1984). Most importantly, this strong triangulation ensured that the findings would be credible and trustworthy, both internally within the school community and externally within the fields of academic research and educational practitioners.

**Methodological triangulation**

1. Surveys;
2. Researcher journal (field notes);
3. Focus group interviews;
4. Individual interviews; and
5. Documents from the school.

**Data triangulation***Participants*

1. Surveys were administered to all staff;
2. Interviewees were included from key areas of the school community;
3. Focus group interviews were held with a wide range of school community groups; and
4. Rigorous and transparent sample selection procedures were used.

*Time*

1. The researcher journal was maintained from mid-2001 – December 2004;
2. Staff surveys were administered in January 2004;
3. Focus group and individual interviews took place between February and April 2004; and
4. The school's first strategy evaluation process took place between August and November 2004.
5. Some data from 2005, including the results of the second evaluation of the Loreto Normanhurst Student Growth Model, were incorporated.

*Space*

1. Focus group and individual interviews were held in one of two meeting areas in the school;
2. One interview was conducted in a house in Melbourne.

**Investigator triangulation**

1. An external interviewer conducted focus group and individual interviews with all staff groups and made observations concerning this data;
2. The observations of trusted colleagues from within and beyond the school community;
3. The establishment and operation of both the Verity Committee and the Critical Panel;
4. Use of data generated by others:
  - i) the school's strategy evaluation process was conducted by a team of practitioner researchers from the staff, together with an external researcher. The inclusion of this data was not originally anticipated: its inclusion was an example of the emergent design of the study;
  - ii) agendas, minutes of a range of group meetings e.g. School Council; and
  - iii) external data eg awards made to the school or individuals by external organisations; high stakes examination and competition results.

**Theory triangulation**

1. Through the literature, theories of culture, change and leadership were examined with reference to the data;
2. A range of possible themes and patterns were tested out in interpreting the data and building theory; and
3. Use of analysis techniques which cross-referenced the data.

**Table 4.6 Methods of triangulation used in this study**

In summary, the participant-as-researcher sought to establish credibility for the study through the range of data collection strategies, sampling methods, methods of analysis, and conclusions drawn on the basis of:

- whether they were **coherent** and ‘made sense’ – to the researcher/principal, and to the groups in the school community;
- whether they **fitted** with existing knowledge, both *emic* and *etic*;
- whether they were **relevant** to the work and the future of the school, and/or other schools elsewhere, and were, therefore, transferable (Popper, 1972; Pritchard, 2000).

## **Transferability**

The value of a case study is its uniqueness (Janesick, 2000); yet conclusions drawn from a single case study can be generalised to other instances and a wider population (Cohen et al., 2000; Flick, 1998; Gomm et al., 2000b). Stake (2000b) refers to this as ‘naturalistic generalisability’, and Lincoln and Guba (2000) as ‘transferability’. Gomm, Hammersley et al. (2000a) explain the transferability of the findings of case studies thus:

...readers of case study reports must themselves determine whether the findings are applicable to other cases than those which the researcher studied...The burden of proof is on the user rather than on the original researcher; though the latter is responsible for providing a description of the case(s) studied that is sufficiently “thick” to allow users to assess the degree of similarity between the case(s) investigated and those to which the findings are to be applied. (p.100)

Therefore, while this study described and analysed a process of change in a single bounded situation, others may derive benefit from the description of the situation, the insights proffered, the assertions made and the conclusions reached (Stake, 1995). The findings from this setting may be transferred to another on the basis of ‘fit’ (Donmoyer, 2000; Gomm et al., 2000b; Lincoln & Guba, 2000; Stake, 2000b).

In particular, the insights and methodological innovations derived from being a participant-as-researcher, and especially an insider researcher in a position of power within the case study school, may be of use to other school-based practitioners, particularly those in leadership positions. The next chapter, the first of four findings chapters, develops this theme further, addressing the findings related to the research processes associated with this study.

## CHAPTER 5: FINDINGS - RESEARCH PROCESSES

The findings of this study are grouped into four categories – research processes; the development of a new educational paradigm; the reinvention process and outcomes; and leadership. Each of these is presented in a separate chapter. The research processes developed and used within this study emerged as an area of significance within the study, confirming the understanding of qualitative research as emergent, both in design and in findings (Larson, 1992). Although many issues related to being an insider researcher had been anticipated in the research design, a number of unanticipated outcomes became apparent in the course of the study. How the researcher in this study dealt with these methodological challenges offers a potential contribution to both theory and practice in the field of educational research.

The research processes used in this study had a significant impact on the reinvention process within the school in question, and also on the researcher. For this reason, this aspect of the study is presented as the first of the findings chapters. The reinvention process emerged as a result of the school's strategy process and led to the development and implementation of a new educational paradigm (see Figure 6.1). Findings related to this process of development and implementation are discussed in Chapter 6. The reinvention process was also intended to result in a continually reinventing school culture. This process and its outcomes, both intended and unintended, are discussed in Chapter 7. Chapter 8 relates to leadership of the school reinvention process, and links elements from the earlier findings chapters.

In discussing the impact of the research on the reinvention, this chapter addresses several of the research sub-questions within this study, especially:

4. What factors assisted the reinvention process?
5. What factors hindered the reinvention process?
9. What were the learnings from the reinvention process?

Overall, it is argued that the research processes themselves contributed, at least partly, to the way in which Loreto Normanhurst, a school in the Mary Ward tradition, reinvented itself to meet the needs of girls at the start of the 21<sup>st</sup> century, thereby helping to address the research question on which this study is based, 'How can a school in the Mary Ward tradition reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century?'

## ***Unexpected consequences and emergent issues***

Some of the challenges of the methodology inherent in this research were discussed in Chapter 4. Several of these were predictable in a study conducted by an insider in a position of power. Yet, in the course of this study, many issues emerged which were unexpected, and which led the researcher/principal to take particular steps to support the school community and to safeguard both the reinvention of the school and the research on the reinvention process. These emergent issues were:

1. underestimation of the complexity of the roles of the participant-as-researcher for the school community;
2. the resultant emergent research design by the researcher/principal and significant decisions by the principal/researcher which affected the reinvention process;
3. impacts of the research on the reinvention of the school, both anticipated and unanticipated;
4. the complexity of the roles of the researcher/principal for the person of the principal/researcher ; and
5. the adoption of autoethnography and transpersonal research methods as vehicles for managing this complexity.

## ***Underestimation of the complexity of the roles of the researcher/principal - for the school community***

Within the research design for this case study it had been anticipated that there would be significant issues relating to the position of the researcher/principal within the school in question. The methodology developed made allowance for many potential drawbacks and challenges for a researcher who conducts research in her own organisation (Evered & Louis, 1981; Hartley & Benington, 2000). The establishment of the internal Verity Committee and the external Critical Panel, for example, were major innovative means of addressing these issues (see Chapter 4). Despite these provisions, it became apparent that the complexity of the roles of the principal/researcher and researcher/principal had been underestimated in terms of the effect on the school community in question. This underestimation covered three main areas: an initial, more general, underestimation on the part of the researcher/principal; more specifically, an underestimation of the extent to which the study involved researching her own roles as principal and as change agent; and the emergence of certain unanticipated issues related to being an insider researcher in a position of power. These areas are now addressed.

## **Initial underestimation by the principal as researcher**

In 2001, shortly after the start of the Loreto Normanhurst strategy process, many people both inside and outside the school suggested that the process of reinvention should be documented. In response to this perceived need, as well as to ensure that the process was based on appropriate theory and literature, the principal/researcher decided to undertake a formal study of the reinvention process. Her intention was to document and analyse the process, and in so doing, honour the experience of those involved in the reinvention. She anticipated that, while she herself would bear the burden of the work involved, and all responsibility for the study, the members of the school community would not only be participants but also co-researchers (Hartley & Benington, 2000) or 'collaborative partners' (Merriam, 1998) with her in this endeavour. The principal/researcher's initial expectation was that her efforts as researcher in the documentation and analysis of the school's reinvention process would be welcomed by the school community as being of value to the school itself, and also to the wider education community.

This expectation was shared by many within the school community, as illustrated by such comments as 'You'll be modelling the life-long learning we keep talking about' and 'You'll get so much out of it and it will be good for the school' (J200201-02). Some members of the school community, however, expressed reservations, 'People will need permission to be honest, especially since you're the boss' (J200201-02) or concern that the principal would be negatively affected by the work involved, 'You really are mad. When are you going to find time to do it?' (J200201-02). Others questioned whether the reinvention of the school was happening simply so that the principal's research might proceed (J200402; CP02). This issue is discussed in more detail at the end of this chapter.

Growing awareness on the part of the principal/researcher that such viewpoints were held by some members of the school community modified her initial understanding. It also led to recognition of the need to reassure school community members that the research was intended to support the reinvention of the school, and to the development of further methods to protect both participants and the integrity of the research. These are discussed later in this chapter.

## **Underestimation of the extent to which the study involved researching the principal/researcher's own roles as principal and as change agent**

The focus of this study was the reinvention of Loreto Normanhurst. Nevertheless, only gradually did it become apparent to the principal/researcher that she herself played a significant part in what was being studied (Delyser, 2001; Smyth & Holian, 1999). An early

comment by a member of the Critical Panel referred to the researcher/principal's self-representation as 'strangely passive', despite being very active as principal and change agent in the reinvention process (CP01; CP02). The need to articulate the principal's role in the reinvention process resulted in the necessity to think on many levels and from many different perspectives almost simultaneously. As discussed in Chapter 4, Merriam (1998, p.103) describes this activity as 'schizophrenic' in that 'while participating, the researcher tries to stay sufficiently detached to observe and analyse.' In this study, the researcher/principal's experience confirmed Merriam's view that this is 'a marginal position and personally difficult to sustain', but nonetheless rewarding in the challenge it presented.

### **Issues related to being an insider researcher in a position of power**

Being an insider researcher in a position of power gives rise to obvious questions:

1. will people say what they really think?
2. because the researcher is in a position of control within the study site, will she (even unwittingly) shape the research to justify or prove her own views?

From the outset, the planning of this study had taken into account some of the potential difficulties of the researcher being an insider researcher in a position of power. Through such means as the establishment of the Verity Committee and of the Critical Panel, and the incorporation of triangulation of methods and sources, it was anticipated that these difficulties would be overcome. To a large extent, this was the case. As was noted by another researcher (KI-02) in private communications, the school community – or some members within it - could have refused permission for the research to proceed, given the sensitive position of the principal/researcher in relation to participants. Yet this did not happen. (See Critical Panel report, Figure 4.2)

Nevertheless, despite the provisions that were made (as discussed in Chapter 4), the challenges entailed in being an insider researcher in a position of power were underestimated. In many ways, the principal/researcher had at first considered such provisions as ethically and theoretically necessary rather than as real issues within her own school community. Some of these 'real issues' are now described.

#### **Conduct of focus group and individual interviews**

The original research design provided a measure of protection for staff participants. While the researcher/principal conducted focus group and individual interviews with other participants, such as parents and students, all staff focus group and individual interviews were intended to be conducted by the Director of Professional Learning, a member of the school's Leadership Team, who regularly facilitated focus group interviews as a normal

part of her work within the school. However, the Verity Committee perceived the Director of Professional Learning as being too closely associated with the principal/researcher for staff participants to feel comfortable and to speak frankly (CP12; CP13).

Several changes were made to the research design to address these concerns. Instead of the Director of Professional Learning, an experienced external interviewer from a local university was used to conduct all focus group and individual interviews of staff members. The process of selecting an external interviewer included the opportunity for staff to submit names of potential interviewers, and endorsement by the Critical Panel and other external researchers (CP07).

After the completion of the interviews, however, staff opinions regarding this interviewer were divided: some participants had a favourable view of how he had conducted the interview of which they had been part, while others had a less satisfactory experience. Given the wide range and amount of data generated for this study, and the opportunity for triangulation that this offered, this difference of opinion was not considered a significant issue (Stake, 1995).

An external transcriber was also used and instructed to delete any names where these were used on the tapes. The researcher/principal had access only to the transcribed proceedings, not to the tapes themselves. Although complete anonymity was not possible, as the researcher/principal knew the identity of members of focus groups, it was generally not possible to identify particular speakers (although some participants included biographical details which identified them.) These modifications to the research design placed some restrictions on the richness of the data but increased the confidentiality measures for staff, and the likelihood of frank opinions being offered.

#### **Presence of the principal/researcher in focus group interviews of staff**

The original research design allowed for the researcher/principal to be present during, although not to conduct, staff focus group and individual interviews in order that non-verbal interactions could be recorded and interpreted. The Verity Committee expressed the view, however, that her presence might inhibit participants (CP12; CP13). For this reason, the researcher/principal decided not to be present in focus group interviews, thus modifying the original research design.

#### **Obtaining the 'real' opinions of participants**

One member of the Verity Committee expressed to the chair of the Critical Panel her doubt whether the principal as researcher would 'ever get what people really think.' (CP12; CP13). In response to this issue, a member of the Critical Panel commented, 'The reality

is that no researcher ever will do so [get people's real opinions]: an outsider who comes in cannot translate the culture. It would be like someone trying to translate a foreign language.' (CP06). This comment summarises the role of the researcher in any qualitative research project, as the chief instrument or tool in the collection and interpretation of data (Denzin & Lincoln, 2000b; Goetz & LeCompte, 1984; Merriam, 1998; Stake, 2000a). Nevertheless, the impact of the researcher/principal's pre-existing position in the school was significant, and thus a range of methods, particularly the modifications described above, was implemented to increase the likelihood of participants being prepared to speak openly. In fact, the transcripts revealed a tendency for staff focus group interviews to be used as a forum for general venting of frustrations related to the change process.

### **Staff frankness, given that participants had to continue working with each other**

The Verity Committee had suggested that some staff might find it difficult to be candid in a focus group interview, as they would not want to hurt others, and they would have to continue working with each other afterwards. It was also noted that some might see it as an opportunity to cause hurt (CP12; CP13). However, data from the transcripts of individual and focus group interviews, together with survey responses, indicated that participants engaged freely both with each other and with the questions and issues raised. Further, the deliberations of the school's participant researcher group (discussed later in this chapter) provided further evidence that community responses had been open. In order to protect participants, this group spent considerable effort deciding how to report on the data received from the evaluation of the first year of implementation of the new learning model in a way that would not compromise or expose individual participants.

### **Staff concerns about the impact on the principal/researcher**

One staff member expressed concern that reading negative comments in transcripts of focus group and individual staff interviews might personally 'wound' the principal/researcher (J200402). Another staff member expressed concern that reading the transcripts might unduly influence the principal/researcher's thinking as leader of the change process, thereby affecting the reinvention (J200402). To address this concern, the principal/researcher assured concerned staff that she had adequate personal and professional support (Smyth & Holian, 1999). Yet there was a need for sensitivity and care in how information gleaned from transcripts was fed back into the reinvention process, and also the need to avoid defensiveness when criticisms were made. The principal/researcher provided feedback to staff in April 2004, thanking them for the openness and trust exhibited in the transcripts (J200404).

### **Principal as researcher: seeing too much**

With access to potentially sensitive information, the principal/researcher might see too much and risk 'exposing previously "undiscussable" issues, disturbing arrangements that serve particular people or purposes' (Smyth & Holian, 1999, p.3). This was indeed a risk in this research. As a result, parts of this study have had to be reported sensitively, for fear of identifying particular participants, which would not only cause ethical problems in the study but, more significantly, the betrayal of trust of one's colleagues. In this case, the principal/researcher had to exercise extreme caution not to inappropriately divulge information gained from the study when working within the school as principal and as change agent. She needed also to adopt an objective stance when collecting and analysing data, moving constantly between an *emic* and an *etic* perspective (Denzin & Lincoln, 2000b; Goetz & LeCompte, 1984), as explained in Chapter 4.

### **Issues for the Leadership Team**

One member of the Leadership Team expressed to the principal/researcher the fear that her relationship with her as principal could be damaged by what she had to say as part of the research (J200402). Others admitted reluctance to express negative opinions in the focus group interview held with the Strategy Team - among whose members were the chair of the School Council, parents and staff members - out of concern that this might be interpreted as lack of faith in the reinvention or disloyalty to the principal on the part of her closest colleagues. While all staff were encouraged to approach members of the Verity Committee if they had concerns, for similar reasons of loyalty, members of the Leadership Team were hesitant to do this (J200402).

To address this concern, alternative means of providing a 'safe' environment for Leadership Team members to contribute their views were established. In discussion together, the researcher/principal and the Leadership Team developed an additional mechanism, seen by all as simple and effective, to provide a safe environment for them. This entailed one member of the Leadership Team approaching each other member of the Leadership Team to discuss his/her potential concerns about the research. This information was aggregated before being provided to the researcher/principal, so that the views of individual informants could not be identified. The ensuing report (Mockler, 2004b) identified that 'in no way were the concerns expressed as criticisms of either the study itself or the conduct of the researcher.'

Methodological adjustments were thus made to address all the above issues. The emergent research design which resulted is discussed in the ensuing section.

## ***Emergent research design and significant decisions by the researcher/principal***

Several changes were made to the research design in the course of this study. These changes fall into four major groups: changes to the duration of the study; the inclusion of additional data from sources external to the researcher/principal; changes made in response to unanticipated issues relating to participants, as outlined in the previous section; and additional refinements made by the researcher/principal to strengthen both the research and the reinvention process.

### **Changes to the duration of the study**

The duration of the intensive data collection phase of the study was extended by one year, until the end of 2004, in order to include data on the first year of formal implementation of the LNSGM, the most significant aspect of the school's reinvention. This extension enabled more conclusions to be drawn about the reinvention process, and the extent to which the school had become 'continually reinventing', since members of the school community were more likely to have formed opinions on these matters once implementation had begun. Further, by placing the major data collection phase early in the 2004 school year, rather than at the end of 2003, it was thought that teachers and other staff would be more rested than at the end of a school year, and therefore able to contribute their views from a more balanced position. Surveys and interviews were conducted between February and April 2004, and the researcher's journal was continued until December 2004, thus enabling insights to be recorded throughout the whole of the first year of implementation of the LNSGM. Some additional data from 2005, during the process of final analysis and writing up of the study, were also included, mainly as Epilogues to Chapters 6 and 7.

### **Additional data sources**

Additional data sources were added, including data from groups established in 2004 within the school. These groups included the 'Strategy Evaluation Think-tank' and the 'Participant Researcher Group' which conducted the 2004 formal evaluation of the first year of implementation of the Loreto Normanhurst Student Growth Model. Details of these groups and the data obtained from them are provided later in this chapter, and in Chapter 6. The inclusion of these data strengthened the study in two ways.

First, more perspectives were included, and over a longer time frame, until the end of 2004, after a full year of implementation. Second, the school's evaluation of the first year of implementation of the Loreto Normanhurst Student Growth Model was designed and

conducted, not by the researcher/principal, but by volunteer staff members (the Practitioner Researcher Group) under the supervision of a senior academic from a local university (but not the university through which this study was undertaken). As part of this evaluation, data were collected from a wide range of participants within the school community at the end of the 2004 school year. Reference is also made to the school's evaluation of the second year of implementation, the report of which was completed in December 2005. The 2005 evaluation process and methodology were similar to those used in 2004, with the oversight of an external researcher. The opportunity that this data afforded for triangulation with the researcher/principal's data was highly valuable.

### **Additional refinements**

Finally, the researcher/principal made additional refinements in order to strengthen both the research and the reinvention process. One such refinement was the establishment of regular meetings between the chair of the internal Verity Committee and the chair of the external Critical Panel. The two chairs often met prior to the Critical Panel meetings with the researcher/principal. This enabled information of a range of types to be passed on to the researcher/principal through the Critical Panel. This information included suggestions of how to improve the implementation of the reinvention; feedback on how the school, particularly the staff, was being affected by the reinvention or the research on the reinvention; and encouragement or criticism of the principal/researcher. The chair of the Critical Panel established a simple criterion for dealing with concerns expressed by staff to the Verity Committee: 'would this matter be an issue if the principal was not involved in this research?' If the answer was yes, then it was perceived as an issue outside the ambit of the Verity Committee or Critical Panel (CP06) (See also the Critical Panel report, Figure 4.2).

Another refinement was the establishment by the principal/researcher, in early March 2004, of the 'Strategy Evaluation Think-tank' (SETt). Chaired by the principal, this group consisted of staff with a range of perspectives – classroom teacher, Heads of Department, House Coordinators, Year 7 Team member, union representative, and two other members of the Leadership Team. Each member was responsible for collecting the views of their constituency and communicating to and from the SETt. The terms of reference for this group identified it as an advisory rather than a decision-making body, with two main tasks: to act as a 'clearing-house' for ideas and concerns from staff regarding the reinvention, and to determine how the school would conduct the ongoing evaluation of the strategy, or reinvention. Although the purpose in establishing this group was to facilitate the reinvention process within the school, the fortnightly meetings of this group provided further

rich data for this study on how teachers in the school were experiencing the reinvention and the challenges of implementation.

The SETt, as a by-product of carrying out its agreed roles, effected change within the school. Its members also changed and developed as a result of being part of the group, enhancing personal and organisational capacity-building (Mitchell & Sackney, 2000). Thus, as is described in the ensuing section, the research itself impacted on the reinvention of the school.

### ***Impacts of the research on the reinvention of the school***

In a number of ways, this study impacted on the school reinvention it focused upon. Many of these impacts had been anticipated prior to the study, but many had not. Some factors, potential or actual, assisted this study, and the reinvention of the school, and others hindered. All are summarised in Table 5.1, and discussed below.

#### **The multiple roles of the researcher**

As principal of the case study school, the researcher had understanding of and access to many aspects of the school and its culture. This was an advantage, and so was the capacity-building she experienced as leader through the process of conducting the study, since 'leaders must be able to build capacity in themselves and others to respond swiftly, knowledgeably, and responsibly, to the constant currents of uncertainty and change' (Hargreaves, 2002, p.ix).

<b>Factor</b>	<b>Anticipated impacts</b>	<b>Unanticipated impacts</b>
Multiple roles of the researcher	<p><i>Assisting</i> The principal had knowledge of and access to the school culture because of her position in the school.</p> <p><i>Hindering</i> The principal's conduct of the study could be used by others to endorse or undermine her as principal, or as researcher.</p>	<p><i>Assisting</i> Capacity-building occurred in the principal as leader.</p> <p><i>Hindering</i> Management of difficult issues as principal could impact negatively on the role of researcher, and vice versa. The principal/researcher might see too much.</p>
Hawthorne effect	<p><i>Assisting</i> Staff would be encouraged and more positive because the reinvention was the focus of research.</p> <p><i>Hindering</i> Some may not have wanted to be the focus of a study.</p>	<p><i>Assisting</i> The principal/change agent's role and actions were part of the study, which led to greater personal reflection.</p> <p><i>Hindering</i> Some community members were confused about the motives for the study.</p>
Reinventing culture		<p><i>Assisting</i> Data from the study led to changes in the reinvention process and the school.</p>

Building relationships		<i>Assisting</i> The relationship between the Chair of Critical Panel with staff (through the Verity Committee) promoted trust.
Reinvention based on sound research	<i>Assisting</i> Reading by the principal/researcher would inform her views and be shared with others.	<i>Assisting</i> Data sheets provided to staff served as a reminder about the steps in the reinvention process.
Reinforcing of school's values		<i>Assisting</i> Data sheets provided to staff served as a reminder of the school's core values and became part of the data used within the school.
Data collection methods		<i>Assisting</i> Data collection was an opportunity for safe venting of concerns. These data provided additional information for the principal in leading the reinvention process. <i>Hindering</i> Some data had a negative influence on staff (e.g. members of focus group interviews) and on the researcher/principal.

**Table 5.1 Impacts of this study on the reinvention of Loreto Normanhurst**

On the other hand, the new ways of working, and new conditions of employment necessary in a reinvention, led to a period of industrial unrest and negotiation, particularly in 2003. At Loreto Normanhurst, the principal was the employer, so the industrial difficulties impacted strongly on her role as principal. This situation could have resulted in staff negativity towards the principal being transferred to her other role as researcher, and the possible withdrawal of staff support for the research. However, this did not occur. Conversely, issues associated with the study could have impacted negatively on the role of principal. Finally, as discussed earlier, there was always the possibility that the principal/researcher would 'see too much' (Smyth & Holian, 1999) and feel compromised in her role as principal or as researcher.

### **Hawthorne effects**

The principal/researcher had anticipated that the conduct of this study, and the external attention which the reinvention attracted - visitors from local, national and international locations, and the school's success in the Top 10 Australian schools contest (see Chapter 7) – could lead school community members to value the reinvention more highly, thus producing a Hawthorne effect (Mayo, 1933; Northcutt & McCoy, 2004; Roethlisberger & Dickson, 1939). This was not the case for all members of the school community, however, as discussed in the next chapter. Indeed, some may not have wished to be part of the study, although no one expressed this view directly.

Nevertheless, some confusion was expressed about why the study was being done. Parent conversations in the tuckshop, or on sports field sidelines, as reported by parent members in Strategy Team meetings, and staffroom conversations, sometimes expressed the view that the reinvention was happening only so that the principal could complete her study, thus demeaning the purpose of the reinvention, and possibly hoping to arrest it. This had not been anticipated, nor was the fact that the principal/researcher and her own role was also the focus of the study, leading to greater personal reflection. This ongoing reflection was beneficial to the reinvention.

### **Reinventing culture**

There was evidence to indicate that reflexivity was a characteristic of the Loreto Normanhurst community of late 2004 (see Chapters 6 and 7), with staff constantly examining the internal and external environment, and making changes to meet the needs of the community in an ongoing cycle of reflection-action-reflection (Mitchell & Sackney, 2000; Schein, 1992; Schön, 1983). Was the increasing reflexivity within the Loreto Normanhurst community a result of the reinvention or of the research on the reinvention? Without the theoretical basis provided by this study, doubtless the reinvention would not have progressed as well as it did. Access to relevant literature, through the principal/researcher as part of this study, assisted the school community to expect that change would be ongoing in a 'continually reinventing school', and that evidence-based practice was the norm. This is reflexivity on an organisational or community level. To the extent that the members of the school community held such expectations and were involved in making them become reality, individuals also incorporated reflexivity in their personal and professional lives.

### **Building relationships**

While the next chapter discusses this issue at some length, the noteworthy aspect here is the impact of the Critical Panel, established for this study, on the reinvention itself. This was important for two reasons. First, the chair of the Critical Panel met regularly with members of the Verity Committee, especially its chair. This not only provided a further means for information from staff to reach the principal/researcher but also an 'independent' means by which concerns could be defused and explained, and trust built. Second, having an IBVM sister as a member of the Critical Panel enabled the principal/researcher to check her methods and emerging conclusions against the values of the school.

## **Research-based changes**

The researcher grew in skills and awareness through her engagement in this study, particularly through access to a range of literature and other research, and sharing these with others. Since she was also the major change agent, this impacted on the reinvention. As Heron (1996, p.107) points out, 'such personal transformation, by virtue of the inquirer's presence in and interaction with the research domain, extends into social and environmental transformation'. Examples in this case were the principal's establishment of the Strategy Evaluation Think-tank and of 'IEU/Admin' meetings each term between staff union representatives and some members of the Leadership Team (see Chapter 6).

Reading from the literature in such areas as leadership, change, culture and educational innovation, in the role of researcher, impacted positively on and supported the principal/researcher's other roles. Marzano (2005) refers to the need for leaders of second-order change to be 'knowledgeable about the research and theory regarding the innovation and fostering such knowledge among staff through reading and discussion' (p.72) and also able to provide conceptual guidance in 'how the innovation will affect curricular, instructional and assessment practices' (p.70). Selected items from the literature on leadership, culture, change, and holistic education, were shared with the school's staff, and particularly with the Leadership Team, thus developing and supporting that group and, through them, other teams within the school. In addition, the role of change agent within the school was enhanced, as ideas from the literature on change and culture were absorbed and shared with individuals and groups within the school community. The provision of information sheets, which outlined the steps by which the school had already changed since 1994, to staff at the time of data collection in early 2004 (see Appendix 3) served as a reminder of how far the school had progressed in the reinvention process.

## **Reinforcing of values**

Similarly, an information sheet which summarised Catholic and Mary Ward values was distributed to staff at the time of data collection (see Appendix 4). This served as a reminder of the school's core values, and enabled further connections to be made between that value base and the rationale for and processes of reinvention. This information sheet was subsequently used within the school in regular staff formation, and became part of the school's means for capacity-building and formation in its underlying religious charism.

## **Data collection methods**

The formal data gathering from staff, particularly the focus group interviews at the start of 2004, provided an opportunity for staff to communicate their concerns about change and aspects of the reinvention in a safe environment. For the principal to have access, through the transcripts, to such apparently uninhibited expressions on the part of staff was a great asset, enabling further insight into staff concerns which could then be addressed and factored into the change process (see Chapter 6). At the same time, the school's Leadership Team expressed some concerns regarding the potential impact of the research on the reinvention, as recorded in the researcher journal from February 2004 (J200402):

1. there was concern that 'people are being stirred up by being asked these questions' (as part of the research data collection) and fear that this could have a negative impact on the reinvention;
2. the 'stirring up (of) negative responses that had been previously worked through... (was) diverting the attention of the Leadership Team from the focus on hand, to having to deal with staff issues';
3. some members expressed concern at the potential impact on the school when the research was published; and
4. concern for the possible impact on the researcher/principal, and ultimately the school, of her reading the transcripts of these interviews:

'X suggested that I needed to quarantine the information I got from reading the transcripts until I had the chance to reflect and make sense of it. Otherwise I could be influencing the direction of the reinvention based on what I had read, and the opinions expressed by people in the focus groups were not necessarily balanced. I could unwittingly bias the direction and the energies of the Leadership Team, for example...Given what some members had been told had been said by people in other [focus] groups, I could not fail to be deeply affected by this...there was a general expression of concern for me as human being.' (J200402)

The ensuing section discusses more fully the impact of the study on the principal/researcher.

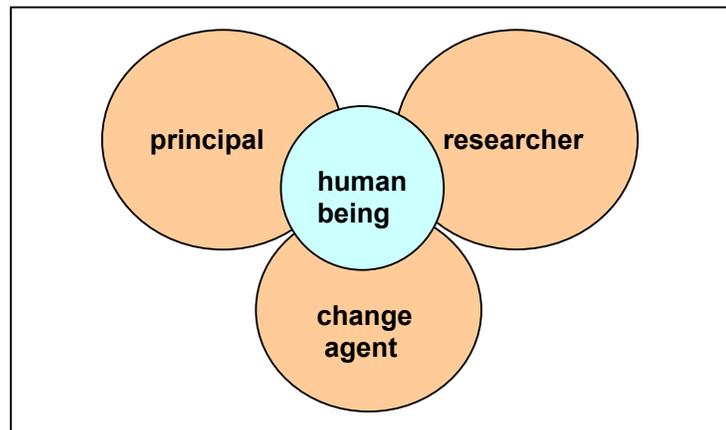
### ***The complexity of the researcher/principal role in this study - for the principal/researcher***

Many insights were derived from the intersection of the several roles held simultaneously by the researcher in this study, and this in itself helped provide data for the study. The role of the researcher, as the primary instrument for collecting and interpreting the data (Cohen et al., 2000; Eisner, 1991; Miles & Huberman, 1994; Walford, 2001), was central to this

qualitative study. However, as described in earlier chapters and illustrated in Figure 5.1, this researcher also held other roles which impacted on the study. She was:

1. the researcher;
2. the principal of the school being researched (and intended to continue in this role after the research was completed);
3. the major change agent, driving the reinvention processes within the school; and
4. a human being, who was affected by the research she was undertaking, by the feedback she received and by the reinvention process itself (Braud & Anderson, 1998; Heron, 1996).

The remainder of this section discusses the findings concerning the complexity and interactivity of these multiple roles, from a phenomenological perspective.



**Figure 5.1 The multiple roles of the researcher in this study**

Throughout the study there was a constant need for the researcher to be aware of which role she was exercising, and also of the potential for role confusion. For example, when data were collected directly from members of the school community, some staff members felt the need to clarify whether the researcher was acting in her role as principal or her researcher role.

Further, some staff perceived that at times the principal was distancing herself from what was happening in the school, and were concerned that her role as researcher may have caused this (II05). The multiple roles of the researcher, as well as different interpretations of 'shared leadership', which is discussed in Chapter 8, may have contributed to this confusion. Insider researchers need to 'alternate between immersing themselves in the situation and withdrawing to reflect and analyse what is going on and the next steps they may take' (Smyth & Holian, 1999, p.4). Such an action-reflection cycle is also necessary for any leader, particularly the leader of a major reinvention process (C. Day, 2000; Schön, 1983).

At times, views expressed by staff members in surveys or focus group transcripts were not accurate, or were critical of action taken (or not taken) by the principal or members of the Leadership Team. None of this could be countered, explained or defended when she was acting in the role of researcher. For the research to be authentic, participants had to be able to express whatever they thought or felt, and any reference to material from the transcripts by the principal/researcher could be seen as threatening to individuals and compromising to both the research and the reinvention. As previously discussed, however, access to these views was helpful to the principal/researcher in guiding the reinvention process.

A further risk of the multiple roles lay in the potential threat to the principal/researcher's ongoing role in the school. As a researcher with a shared history and intending to continue working in the school after the completion of the research project, extra care was needed to manage both working relationships and boundary issues during the research process (Smyth & Holian, 1999). The work of a school leader is challenging enough (Cannon, 2004; Lee, 2005; Loader, 1997; Starratt, 2003; The SOLR Project, 2003). The leader who attempts to change the paradigm of schooling exposes herself to personal and professional risk (Marzano et al., 2005; Schein, 1992; Smyth & Holian, 1999). The possibility always existed that the principal could become disheartened by the additional challenges presented in the role of researcher, or alternatively, she could be so overwhelmed by the role of change agent that she no longer felt capable of or wished to continue in the role of principal or researcher. Women principals, in particular, can bear a heavy personal toll in such situations (Hargreaves, 1997; Sachs & Blackmore, 1998), 'as impossible requirements or unpalatable demands stretch their ethics of caring to the limit' (Hargreaves, 2002, p.ix).

In conclusion, this study reinforces the need for potential insider researchers to be aware of the increased demands of juggling several roles (Smyth & Holian, 1999) and the potential risk both to the organisation and to the researcher personally. Insider research is a challenging undertaking, and requires the researcher to have adequate professional and personal support structures. This study had a profound impact on the researcher/principal, as researcher, as 'organisational actor' (Evered & Louis, 1981), and as human being, and it changed her in the process. Two branches of qualitative methodology – autoethnography and transpersonal research methods - provided useful frameworks for managing these experiences.

## ***Adoption of autoethnography and transpersonal research methods***

### **Autoethnography**

In this study, the case was what mattered: here the case was the change process within Loreto Normanhurst. But a difficulty lay in how and where to include the researcher's experiences and insights as principal/change agent/human being. The adoption of autoethnography (Delyser, 2001; Ellis & Bochner, 2000) as a research method helped resolve this difficulty, enabling the role of the researcher to form a legitimate part of the study. Ellis and Bochner (2000) articulate clearly the constant reflective movement involved in this methodological approach:

Back and forth autoethnographers gaze, first through an ethnographic wide-angle lens, focusing outward on social and cultural aspects of their personal experience; then they look inward, exposing a vulnerable self that is moved by and may move through, refract and resist cultural implementations....In these texts, concrete action, dialogue, emotion, embodiment, spirituality, and self-consciousness are featured, appearing as relational and institutional stories affected by history, social structure...(Ellis & Bochner, 2000, p.739)

The research genre of autoethnography provided a mechanism for this researcher to include, as part of this study, her own experience and her attempts at the 'internal accountability' referred to by Starratt (2003, p.242) in describing 'school administration as autobiography'. In the ensuing findings chapters, the researcher describes and analyses her own experience in this study – as researcher, as principal, as change agent, and as human being.

As expected within a constructivist view of reality (Piaget, 1990; Prawat & Peterson, 1999; Vygotsky, 1978), the researcher herself learned much and was changed as a result, both personally and professionally. What assisted her to do this, and to see that this experience constituted legitimate data, was the identification of another, related, genre of qualitative research - that of transpersonal research methods.

### **Transpersonal research methods**

Transpersonal research methods honour the transformative or spiritual dimension of human experience (Braud & Anderson, 1998; Clements, Ettlign, Jenett, & Shields, 1998). One of the unique properties of applying transpersonal approaches to research is the potential transformation of the researcher (Duignan, 2004a; Halpern & Lubar, 2003), rather than the simple acquisition of skills. Indeed, in this study, the personal growth and transformation of the researcher, while not the primary intention or focus, was itself an

outcome of the research itself. In the course of this study, the researcher needed to reflect constantly on her roles – as researcher, as principal, as change agent, as human being. She changed as a result. Often this was personally painful, as comfortable patterns of thoughts, feelings and action were challenged and changed, resulting in a clarification and transformation of the researcher's essential self (Heron, 1996; Keane, 1987; Valle & Mohs, 1998). There were things that would be done differently in hindsight, things that were still a conundrum; greater understanding and acceptance of people; the necessity of dealing with uncertainty, fear and hurt; learnings about leadership; insights into self; all of which were the result of both the reinvention and the research into the reinvention process. As Braud (1998, p.x) explains,

Transpersonal researchers learn about the topic *and* about themselves, and, therefore, tend to engage research with a spirit of adventure, anticipation, and some trepidation....Self-realization is, after all, a risky business. Ultimately, it is the source for initiating and realizing authentic change in our world.

The researcher in this study sought to understand the reinvention process and the people in her school from a compassionate insider's perspective, and this made the study qualitatively different from emotionally detached research because of the way in which values and intentions framed the way the researcher thought and acted (R. Anderson, 1998). Transpersonal research methods provided the framework for such an approach, and also for the researcher's efforts to describe faithfully the qualities and dynamics of the experience of the participants through use of 'the participants' own voices, allowing them to speak for themselves without necessarily resolving the tensions between different voices' (Braud & Anderson, 1998, p.xxviii). These methods included the transformative enquiry skills enumerated by Heron (1996):

1. being 'present' to people and to situations. The researcher/principal was constantly present in and to the school community, particularly in her roles as principal and as change agent;
2. being receptive to the meaning inherent in what was happening on a daily basis, especially in the reflections recorded in the researcher journal;
3. bracketing (holding in abeyance the classifications and constructs that individuals impose on their own perceiving). This was achieved by seeking alternative perspectives from close colleagues and trusted individuals outside the school;
4. dynamic congruence (practical knowing, knowing how to act, being aware, while acting, of the bodily form of the behaviour and its possible motives). This congruence was achieved through a constantly reflexive attitude on the part of the principal/researcher and through frequent requests for feedback from trusted colleagues;

5. emotional competence, especially the awareness and control necessary to keep actions and decisions free from distorted reactions due to unprocessed earlier distress. The researcher/principal constantly tried to keep an appropriate emotional distance and to separate the researcher role from that of principal and change agent. Professional supervision greatly assisted this process;
6. non-attachment (not investing one's identity and emotional security in the action). Trying to have a balanced approach to life, with family and other outside interests, and a strong faith commitment, assisted the researcher/principal to maintain an attitude of non-attachment, sometimes referred to in spiritual writings as 'detachment' (McBrien, 1981);
7. reframing (trying out alternative constructs). This process was frequently adopted by the researcher/principal and, as principal, she encouraged other members of the school community to do likewise, particularly when facing difficulties. Phenomena can seem to present a single possible interpretation. Particularly when one listens carefully to others, it is possible to 'reframe' the same phenomena into other, quite different, interpretations; and
8. self-transcending intentionality (while busy with one overall form of action, being aware of alternative forms and the possibility of their relevance and applicability). This involved the researcher being aware of herself as 'organisational actor' while engaged in action, in a similar way that metacognition allows a learner to reflect on her learning while actually in the process of learning.

The last two skills were practised frequently in conjunction with the Leadership Team: often a 'devil's advocate' position was taken by the principal/researcher or another member and the group's thinking and/or decisions would be challenged in order to avoid a 'Nut Island effect' (Levy, 2001) in which a well-intentioned team fell prey to an organisational pathology which ended in disaster.

Such methods of enquiry were important in this study in order to challenge any uncritical subjectivity (Heron, 1996). Researchers using a transpersonal methodology framework are likely to have a strong prior commitment to the 'idea' they are investigating. Testing this involves them at a deeply personal level, not simply at an intellectual level. Because the subject of their enquiry is so close - 'they have lived through it, they know it on the pulse...it becomes warming and endearing to them' (Heron, 1996, p.145) – there can be a vested interest in not noticing its shortcomings in the face of experience. The researcher in this study ran such a risk. However, the close involvement of the school community as active 'reinventers' and as participants in the study - and particularly the roles and activities of the Critical Panel and the Verity Committee - ensured that any shortcomings in the research on

the reinvention process were identified and acted upon. The relationship between the principal/researcher and others can be described by the concept of 'co-researcher', an important aspect of many genres of qualitative research, including autoethnography and transpersonal research methods.

In this study, the researcher was keen to involve the school community as co-researchers (L. M. Degenhardt, 2002). The study was intended to support and clarify aspects of the reinvention, and to document the work and commitment of the school community, particularly the staff, from an attitude of respect (Heron, 1996). However, as was pointed out to the researcher by one member of staff, this was **her** study and others did not necessarily see any value in it for them (J200402). Such a comment indicated some cynicism, and perhaps some anxiety on the part of at least some members of the school community. Since transpersonal methodologies, in particular, result in the

transformation of the researcher, the coresearchers, and the readers, so far as each is willing to engage in both the conscious and unconscious aspects of the work and so far as each is willing to be changed through their involvement (Clements et al., 1998, p.117),

this study, as well as the reinvention, impacted in some way on everyone in the school community.

## ***Conclusion***

This study provides evidence that insider research offers unique benefits because of the position and knowledge of the researcher. What is needed, however, is an innovative methodological approach to offset the difficulties inherent in a researcher, particularly one in a position of power, conducting research in his/her own organisation. Chapter 4 discussed how this researcher developed and intended to apply such methodological tools. The findings revealed that this methodology was useful, and many potential issues within the study had been anticipated. Nevertheless, there were others which had not been anticipated or were underestimated. Addressing these issues led not only to an emergent research design but also to personal and professional learnings on the part of the researcher/principal.

In summary, no matter how well planned the methodology for such a study, the complexity of the issues and the people involved can lead to surprises. Future researchers, especially others in leadership positions who intend to undertake research in their own schools, may benefit from knowing in advance of some of the unanticipated outcomes of this study, as well as from the methodology developed in anticipation of the particular issues related to this study. Further discussion of these issues occurs in Chapter 9.

The next two chapters, which address findings related to the reinvention process, discuss the processes, influences on and learnings from the school's attempt, within its Mary Ward tradition, to reinvent itself in order to meet the needs of girls at the start of the 21<sup>st</sup> century.

## CHAPTER 6: FINDINGS - DEVELOPMENT OF A NEW EDUCATIONAL PARADIGM

This chapter, and the one that follows, is core to answering the question of how a school in the Mary Ward tradition could reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century. The following research sub-questions are specifically addressed:

2. What was the reinvention process used within the school to improve the school's response to the needs of girls at the start of the 21<sup>st</sup> century within the Mary Ward context?
3. What factors assisted the reinvention process?
4. What factors hindered the reinvention process?
6. Were Mary Ward's values retained in the reinvention?
7. How successful was the school in meeting the needs of girls at the start of the 21<sup>st</sup> century through the reinvention?

Discussion within this chapter begins with description and analysis of the school's 2001 strategy process, before focusing on the processes and outcomes of developing and implementing a new educational paradigm. Chapter 7 is concerned with the progress towards becoming a 'continually reinventing' school. Figure 6.1 illustrates how these processes were connected.

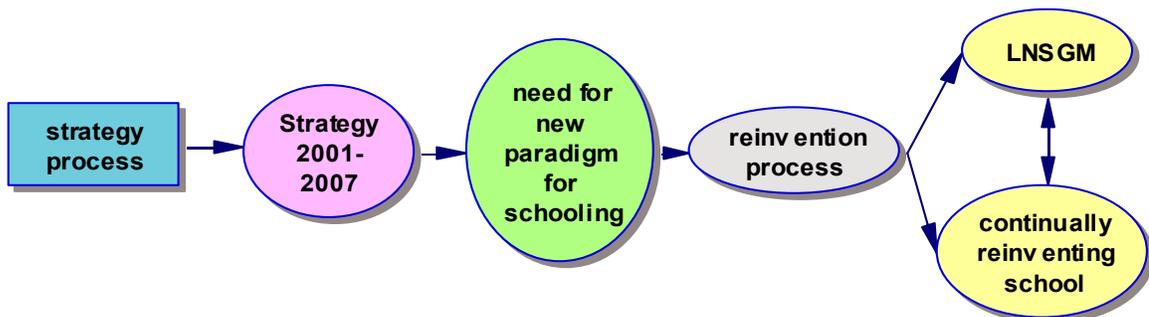


Figure 6.1 The strategy process and the reinvention process

### ***The strategy process***

Strategy was defined as 'Vision directed at what we want to be, not how we'll get there' (strat plan05). The school's strategy process was intended to enable the school community to discern the future direction of the school. It began in 2000, at the conclusion of the school's first strategy phase, *Future Directions 1994-1999*. A Gantt chart (see Appendix 14) illustrates in detail the steps in this process; however, a summary of the most salient steps is provided in Table 6.1.

June 2000	School Council endorsement of the Leadership Team's plan for a strategy process and appointment of external facilitator
November 2000	Appointment of Strategy Team, representative of the school community groups. Data collection from school community: students, parents, staff. Development of 'strategic perspective', linking stories of founders with current school data and 21 <sup>st</sup> century global and societal trends.
February 2001	Development of draft strategy by Strategy Team
February–June 2001	Extensive consultation with stakeholders, including seventeen strategy workshops. All staff attended a 1½ day strategy workshop.
June 2001	Strategy Team decided on the elements of the final 'Strategy 2001-2007'. Decision: 'we must reinvent Loreto Normanhurst', focusing equally on learning and relationships. School's intent formulated: <i>...growing individuals and communities...</i> Priority action: development of holistic Student Growth Plans for every student.
July 2001	Endorsement of final 'Strategy 2001-2007' by School Council. Communication of 'Strategy 2001-2007' to all sectors of school community.
July 2001	Strategy Core Team formed to facilitate process and communication of strategy.
2001-2005	Strategy Team meetings continued three times per year (twice in 2005) to review progress, hear and respond to feedback from community groups, and set new targets.

**Table 6.1 Major steps in the development of the Loreto Normanhurst strategy**

### **Initiation of the strategy process**

The strategy process was intended to be a 'top-down' and 'bottom-up process'. It was initiated by the school's leadership but then driven by debate and emerging consensus of key stakeholders. Fullan (1991, p.66) describes such a situation as the major leadership dilemma at the initiation stage of a change process: 'whether to seek majority agreement before proceeding versus being assertive at the beginning. The fact is that there is a great deal of inertia in social systems, requiring high energy to overcome'. Although top-down change is not usually effective, bottom-up initiatives typically either fail to deliver significant results or fail to connect to the authority structure (Fullan, 1991). The process was, nevertheless, highly inclusive, as illustrated in the outline of the methodology of the strategy process which follows.

### **Methodology of the strategy process**

The strategy process involved a number of steps and elements.

#### **Use of an external facilitator**

The external facilitator, employed from late 2000 until the end of 2004, had a background in business strategy development and some, although limited, experience in working with schools. There were benefits and drawbacks in this. A keener sense of urgency and commitment resulted from working with an external facilitator, since meetings and deadlines which impact only on insiders can more easily be deferred (Loader, 1997, p.65). The school also benefited from this facilitator's experience in strategy processes and,

because he had neither an educational nor a Catholic background, the school community was forced to clarify and articulate assumptions. His business background was also beneficial in increasing the school community's awareness of the world beyond school. Administrators (II01; II08; KI-14), including the principal/researcher, considered him a pivotal factor in moving the school forward, overcoming the inertia referred to by Fullan (1991) (II01; II08), and addressing possible 'strategic myopia' (Schein, 1992, p.300). However, he was unused to such an inclusive process, and was often challenged by the principal/researcher and other Leadership Team members (for example, J200101-05). Overall, staff were positive about the workshops he conducted: 98 per cent of participants reported that they had benefited from the strategy workshop they attended (ChP10; ChP11), and generally gave positive responses to anonymous open-ended evaluation questions provided by the facilitator, shown in Table 6.2.

%	<i>Experience of the workshop</i>	%	<i>Main messages derived from the workshop</i>
60	I felt that my input was valued	55	that we need to change
50	I gained a greater understanding of the process	47	that we need to develop a shared vision
25	I felt personally and professionally challenged	25	that long-term planning is important

**Table 6.2 Staff feedback from strategy workshops**

The facilitator's personal style was, nevertheless, too confrontational for some people (J200101-05; J200203-04) and, over time, staff attitudes towards the strategy workshops changed, with criticism directed at the external facilitator. In the opinion of some staff (IF10; IF01), his style was a hindrance to the whole process, summed up by one participant thus: '[He was] a poor facilitator...who made staff feel threatened and uncomfortable.'(T49). Further discussion of the impact of the facilitator occurs later in this chapter.

### **The process was inclusive**

The process of developing the strategy was highly inclusive, as shown in Table 6.1. A 'Strategy Team', established in late 2000, constituted a 'guiding coalition' (Kotter, 1996), and was a major means by which the school community was involved in 'creating the vision together... illuminating the mission and purposes of the school' (Fullan & Hargreaves, 1998, p.91) (See also, Louis & Miles, 1990, p.42). The Strategy Team represented stakeholder groups (staff, parents, the School Council, the IBVM sisters, ex-students) and every major area of school life (for example, student learning, the boarding school, finances and buildings) (ChP01). Its existence and operation was intended to ensure a

shared leadership approach (Bradford & Cohen, 1998; Duignan, 2004b; Fullan & Hargreaves, 1998; Sackney & Mitchell, 2001), and regular communication with and between all stakeholder groups, as Starratt (1996, p.166) recommends. For example, regular weekly parent newsletters from the school between November 2000 and the end of 2004 included a total of thirty 'feature articles' on the strategy for the future. Together with the School Council, the Strategy Team was the decision-making body which finally determined what the school's strategy would be.

The inclusiveness of the strategy process was alluded to by parents (J200207-09; J200408), by the Strategy Team (IF08; II03), by administrators (II01; II06; II06 ;II07; II08) and by staff. In open-ended responses, around 18 per cent of staff identified the inclusivity of the process as a factor which assisted the reinvention process. The following are representative comments:

Everyone was involved (T56)  
 I was pleased by the extent of the offer of involvement to all groups in the school (HoD/HC)  
 I feel everyone has been given plenty of opportunity to be involved and all staff were encouraged (S80).

Nevertheless, there were some staff members who disagreed that the process was inclusive, or considered that it became less inclusive as implementation decisions were made.

There was an appearance of consensus but near the end it was hijacked. (T58)  
 All people were involved – some felt not listened to. (T60)  
 I think that teaching staff did not have a lot of input into the proposed changes. (T53)

This range of responses to the strategy process and to the efforts at inclusiveness was in keeping with the literature on shared leadership, as discussed in Chapters 3 and 8. A range of views was likely on two issues: whether leadership was actually shared, and whether staff wished to be involved in any event, which could explain the lack of involvement on the part of teachers. Table 6.3 illustrates the degree to which staff from different sectors felt involved in the reinvention process.

	Leadership Team	Middle managers	Teachers	Support staff
Highly involved	83%	50%	13%	8%
Somewhat involved	16%	36%	42%	25%
Not very involved	0	10%	42%	37%
Definitely not involved	0	0	2%	29%
Not sure	0	4%	2%	0

**Table 6.3 Participants' self-nomination of involvement in the reinvention process**

Disagreement over the creation of a guiding coalition from among staff provided a further example of the inclusiveness of the process. The principal and Leadership Team rejected the facilitator's suggestion of creating a guiding coalition comprised of a select group of staff likely to be supportive of change as being potentially divisive, not in keeping with the school's valuing of the contributions of all, and likely to 'balkanise the opposition' (Fullan, 1998a, p.82-3; Fullan & Hargreaves, 1998, p.52). Instead, it was proposed that the school's middle managers would form an initial, and ever-expanding, guiding coalition of staff, since 'it is the people *inside* the school who have the greatest *actual influence* over the nature of the plan' (Louis & Miles, 1990, p.42), and middle managers, both Heads of Department and House Coordinators, were highly influential within the staff.

This did not happen as planned, however. Debate was constant within these groups, particularly within the Heads of Department team, and several members had difficulty working with the facilitator (J200101-05). Although valuable in the process of clarification (Fullan, 2004, p.7), the level of conflict made it difficult for this group to be, or to be seen as, a guiding coalition in the strategy process. Opportunities for staff, including individual middle managers, to participate in the reinvention process, through voluntary membership of a range of teams and taskforces, nevertheless created a series of informal guiding coalitions within the staff. While the intention was a highly inclusive process, a conceptual framework was also necessary.

### **A conceptual framework guided the strategy process**

The external facilitator adopted Kotter's (1996) framework for change, which consists of eight steps:

1. establishing a sense of urgency;
2. creating a guiding coalition;
3. developing a vision and strategy;
4. communicating the change vision;
5. empowering broad-based action;
6. generating short-term wins;
7. consolidating gains and producing more change; and
8. anchoring new approaches in the culture.

Based on the concept of 'reculturing', this model has similarities with Schein's (1992) 'unfreeze - cognitive restructuring - refreeze' theory of organisational change, which in turn draws from the work of Lewin (1947). The intention was to change aspects of the culture of the school so that, while retaining its core values, it would be able to respond better to the needs of the 21<sup>st</sup> century. To do this, data were needed from within and beyond the school.

### The process was data-driven

Using an evidence-based approach (Groundwater-Smith & Hunter, 2000), the strategy process was informed by data obtained from students, parents and staff at the end of 2000 (ChP11), as summarised below:

- Students' responses in surveys and focus group interviews indicated positive attitudes towards the school. However, while most students self-identified as independent learners, they considered that the school catered best for dependent learners (ChP11):

...we had so many kids that saw themselves as predominantly collaborative or independent learners, but who felt that the school was catering for learners that were highly dependent. And, you know, so that was right back at the beginning of the process and I think that that informed some of our thinking around, you know, how do we move forward and grapple with that issue, because that's a huge one for a school to deal with. (I108)

This finding was highly significant, and reinforced the need for a new educational paradigm;

- Parent feedback indicated that 95 per cent of parents were satisfied with the quality of education provided at the school and that the school's values and traditions were of key importance to a majority of parents. Concerns, or a lack of awareness, were expressed, however, about how adequately the school catered for students requiring learning support and the perceived lack of opportunities for parents to interact with the parents of their daughter's peers (Hunter & Jimenez, 2000);
- Staff were surveyed. In order of frequency, Table 6.4 lists the most frequent responses, in order of frequency.

Contributors to the school's current success:	<ol style="list-style-type: none"> <li>1. dedication of staff;</li> <li>2. leadership;</li> <li>3. ethos and values;</li> <li>4. ICT (technology).</li> </ol>
Hindrances to the school's current success:	<ol style="list-style-type: none"> <li>1. teacher dissatisfaction/ morale;</li> <li>2. teacher workload/ administration;</li> <li>3. lack of resources/ facilities;</li> <li>4. resistance to change/ negativity.</li> </ol>
Major changes foreseen in education:	<ol style="list-style-type: none"> <li>1. greater emphasis on technology;</li> <li>2. greater flexibility/independence for students;</li> <li>3. teacher shortage/ lowering of professional standards;</li> <li>4. schools/ teachers required to meet all the needs of young people.</li> </ol>
How these changes might affect Loreto Normanhurst:	<ol style="list-style-type: none"> <li>1. structural changes to allow greater flexibility;</li> <li>2. changes to staff conception of themselves and education;</li> <li>3. greater accessibility of resources;</li> <li>4. hopefully not much, go a bit slower.</li> </ol>
Possible constraints:	<ol style="list-style-type: none"> <li>1. loss of Loreto values;</li> <li>2. reluctance to take risks;</li> <li>3. staff resistance;</li> <li>4. finances.</li> </ol>

How should success be measured?	<ol style="list-style-type: none"> <li>1. happy/ well-rounded students;</li> <li>2. staff morale;</li> <li>3. academic results;</li> <li>4. how students progress in later life.</li> </ol>
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**Table 6.4 Staff survey 2000: major themes**

The analysis of these data revealed conflicting themes: as in the 1996 review of the school (Keane et al., 1996), staff reluctance to change was foreshadowed as well as their awareness of the need for the school to adapt to a changing external environment.

### **Recognition of the external context**

Data were provided on change within the global, technological, social and cultural context (Beare, 2001; Hinton, 1997; Noble, 2002) since ‘schools can no longer pretend that their walls will keep the outside world at bay’ (Hargreaves & Fullan, 1998, p.7). These data related to the emergence of the knowledge society, the growth and influence of technology, socio-constructivist views about knowledge construction (Piaget, 1972; Vygotsky, 1978) and the needs of girls and their education in the 21<sup>st</sup> century (Pipher, 1996; Sadker & Sadker, 1994; Senge et al., 2000; Wright, 1981). These data, as well as the analysis of school-derived data, formed the basis of much thoughtful discussion by participants in each strategy workshop (J200101-05), and ensuing staff workshops between 2001 and 2004. Global events which occurred during the time of data collection – such as the events of September 11 2001, the Bali bombings in 2002 and 2005, the bombing of Iraq in 2003, and the tsunamis at the end of 2004 –served to reinforce the extent of change in the world beyond the school. Overall, this evidence provided sufficient ‘disconfirming data’ (Schein, 1992) to create disequilibrium and caused the school community to draw heavily on its values-base to provide meaning in a time of global upheaval (Starratt, 1996).

### **The school’s Mary Ward tradition and values motivated and guided the process**

The role of the school’s value system in the strategy and reinvention process should not be underestimated. As illustrated in Table 6.4, for staff, the values and ethos of the school was of central importance. Parents and students also, in annual surveys, constantly expressed the importance they placed on these values of the school as a Catholic and Mary Ward school. The school’s Mary Ward history was identified as one of risk and challenge in providing education for the needs of the times. Hence the vision of how the school could be was developed from both a ‘confronting of the brutal facts’ (Collins, 2001b, p.65ff.) and the inspiration and examples of Mary Ward and IBVM values and traditions.

The strategy workshops were pivotal in providing opportunity for reflection and discussion of these values and traditions.

### **Strategy workshops were the means of engaging the school community**

Seventeen strategy workshops were conducted for all staff, representative groups of parents and students, and the School Council. In these workshops, participants engaged with the data collected from within the school community at the end of 2000, with data on the external environment and with Mary Ward values and traditions, all of which were contained in the 'strategic perspective' developed by the principal/researcher. Participants also engaged with and contributed to the draft strategy document developed by the Strategy Team.

The views and ideas emanating from the strategy workshops were incorporated into the Strategy Team's deliberations when determining the final strategy, which was endorsed by the School Council on 24 July 2001 (see Appendix 15). The core strategy values of passionate creativity, wisdom and integrity, were also adopted at this stage. Identified through the process of connecting with the stories of key IBVM sisters, these values kept Mary Ward to the fore in both the strategy process and its intended product.

As one parent (IF04) described it, the strategy process, and particularly the strategy workshops, led the school community to 'think outside the square, [whereas] most institutions are boxed into the usual parameters, [and] to take that step outside the box'. The workshops provided the means whereby the school community could learn as an organisation. Piaget's (1972) theory of genetic epistemology, based on an organism's adaptation to new circumstances and finding a new equilibrium, is useful in understanding the impact of these workshops. Many, including the principal/researcher, had expected a more subtle redirecting of focus (II08). What the process allowed, however, was the freeing of spirits and imaginations to dream of how things might be for students and for the school. As one staff member commented passionately, 'I've been waiting twenty years for this to happen in schools' (200105-12). The strategy ended up being a 'Big Hairy Audacious Goal' (Collins, 2001b, p.197ff.).

### ***Outcomes of the strategy process***

By July 2001, the school's direction was determined, although subject to ongoing review, and the work of turning this direction into reality began. The strategy process led the school community to the conclusion that education needed to change in order to meet the needs of young people in the 21<sup>st</sup> century, in ways congruent with the Mary Ward tradition of education as formation of the human person as an individual in community (Honner,

1998). This was summed up in the intent '*...growing individuals and communities...*', adopted through the strategy process. The school's strategy became that of developing a new educational paradigm, in the context of Loreto Normanhurst. Limerick, Cunningham et al. (1998, p.153) define such an undertaking as a "metastrategic design" which brings together all of the following elements – vision, identity, configuration and systems of action – into a coherent whole'. Kotter's (1996) steps for change, which had guided the process, were transcended by such a definition.

In many ways, this process and the new paradigm were not new at all, however. It was really a process of 'rediscovering' the foundations of the Mary Ward and IBVM/Loreto educational tradition, which has always been 'holistic and person-centred education' (Wright, 2003, p.2). For example, Mother Gonzaga Barry, the 19<sup>th</sup> century founder of Australian Loreto schools,

...saw education...as a sequential process of development of the whole person. She obviously believed that schooling was part of life itself, rather than merely a preparation for life, and thus the school experience was to be happy, rich and full for its own sake. At the same time it was purposeful, practical and challenging, because every aspect of the school environment...was specifically designed with the vision of the whole in mind. (Wright, 1981, p.36)

For the Loreto Normanhurst community, it was a question of adapting this vision into new times. Hence, following the decision on the final strategy, work towards its realisation was pursued in two simultaneous, and interconnected, directions (see Figure 6.1). The first of these was the development of a new paradigm of holistic education which would enable and support a Student Growth Plan for every student in the school. Based equally on the growth of each individual and on the growth of community (Mitchell & Sackney, 2000, p.xii), this new paradigm would support both the academic and non-academic needs of students (Beare, 2001; Mitchell & Sackney, 2000; Mulford & Silins, 2003; Sergiovanni, 1996; Starratt, 1996), rather than around traditional academic disciplines. The process of reinvention involved developing a means of providing this holistic education, and also changing curriculum, pedagogy, roles, structures, and architecture within the school to accommodate it. The end result became known as the Loreto Normanhurst Student Growth Model (LNSGM).

Even more importantly, the school's reinvention involved changing attitudes and outlooks, in a process of ongoing reculturing (Gerstner, 2002; Retallick & Fink, 2002; Schein, 1992), so that the school could become a place of organisational learning (Argyris & Schön, 1978; Mulford & Silins, 2003), a learning community (Hargreaves, 2003b; Mitchell & Sackney, 2000; Sackney & Mitchell, 2001). The intention was to become a 'continually reinventing',

'self-improving' school (National College for School Leadership, no date), based on its enduring values. Segal (2005, p.55), citing Gerstner, describes this as 'building a culture of restless renewal through constantly questioning the status quo'. Continual reinvention required the school to live in/with an ongoing paradox: to turn the notion of perpetual learning and change into a stable set of assumptions, or culture (Schein, 1992, p.363).

Yet, this direction was not a new idea for IBVM/Loreto education either: Sr Mary Wright IBVM wrote almost a quarter of a century earlier (1981, p.16):

If the main characteristic of the world of the present and the near future is rapid, unpredictable change, then it follows that schools need to be far more flexible and adaptive than they have been in the past. Schools in fact need to build into their very structures adaptive systems which enable a continuous reflective response to their environment.

Figure 6.1 illustrated how the strategy process, the development of the LNSGM and the continual reinvention of the school were interrelated. Figure 6.2 illustrates, and Table 6.5 lists, the major steps in these interconnected processes. The discussion which follows draws on the information in Table 6.5 to analyse the major issues involved, first in the development of the Loreto Normanhurst Student Growth Model<sup>1</sup>, followed, in the next chapter, by discussion of the attempt to become a continually reinventing school.

	<b>Development of the LNSGM</b>		<b>Steps to becoming a 'continually reinventing' school</b>
April 2001	'School of the Future' workshop for volunteer staff	2000-2004	'Loreto 5' initiative enhanced teacher learning in ICT, information literacy and learning theory. Direct application to teaching/learning.
August 2001	Workshops conducted to develop principles underpinning ISGPs for volunteer teachers. 44 attended. Ten principles determined.	August 2001	Change management workshops held for volunteer staff – nine conducted for a total of 63 staff.
September 2001	All teachers invited to develop a model for the operation of ISGPs. Nine presented. All models critiqued by staff through a range of processes.	Late 2001	Restructure and expansion of Leadership Team to accommodate strategy and changing school and environmental needs. Positions of Director of Professional Learning and Director of Mission created.
November 2001- March 02	Task force of volunteer and invited staff develop a single model for ISGPs.	November 2001 March 02	Change and transition management issues discussed at staff meetings

**Table 6.5 Steps in developing the Loreto Normanhurst Student Growth Model and becoming a 'continually reinventing school, 2000-2004**

<sup>1</sup> Although earlier data and documents refer to Individual Student Growth Plans (ISGPs), later known as Student Growth Plans (SGPs), the term Loreto Normanhurst Student Growth Model (LNSGM) encompasses these earlier terms.

	<b>Development of the LNSGM</b>		<b>Steps to becoming a 'continually reinventing' school</b>
March 2002	Second task force develops final model, based on FACE curriculum (See Figure 6.3) (now known as Loreto Normanhurst Student Growth Model (LNSGM))	January 2002	Principal announced her decision to undertake a formal study of the reinvention process.
			Ongoing professional development in: - learning theory, curriculum development and pedagogy - ICT and learning - emotional intelligence
		2002	Ongoing communication with/ feedback from all stakeholder groups. Annual teacher scholarship criteria related to strategy from this point.
April/May 2002	Principal travelled overseas to explore similar models in schools and universities, and to study learning communities.		
May 2002	Community consultation re new Model.	July-November 2002	'Structures taskforce' of staff, led by two Leadership Team members, worked to develop structures to support implementation of LNSGM.
February 2003	Strategy Team determined need for architectural spaces sympathetic to new Model. Planning of several new spaces, including: - refurbishment of former school hall into Year 7 space (Deirdre Rofe Centre) - planned extension of existing spaces to form Year 8 space (Teresa Ball Centre) - major building to commence 2006, incorporating two large learning spaces (new Mornane building). Capital appeal planned to raise funds for these building works.		
May 2003	Inaugural Year 7 Team appointed	2003	Implementation Team continues development of theoretical basis for LNSGM and identification of implementation issues.
2003	All faculties identify outcomes to incorporate into Integrated Learning programs		Workshops for students and current and prospective parents.
Semester 2 2003	Year 7 Team worked on 2004 Year 7 program	2003	Extensive professional development in learning theory, curriculum development, ICT and pedagogy for Implementation Team and Year 7 Team. Ongoing professional development for all staff.
Semester 2 2003	Confusion between integrated/ independent / holistic models of learning.	Semester 2 2003	Confusion between roles of various teams and substantive groups.
November 2003	Inaugural SGPs developed by parents, students and advisors.	November 2003	Practical experience of creating SGPs, and working with parents / students in new ways.
<b>Table 6.5 Steps in developing the Loreto Normanhurst Student Growth Model and becoming a 'continually reinventing school, 2000-2004 (contd)</b>			

	Development of the LNSGM		Steps to becoming a 'continually reinventing' school
February 2004	Deirdre Rofe Centre ready for use by Year 7 and Year 7 Team.		
February 2004	LNSGM implemented with Year 7 students	March 2004	Team Director position created to support Team and create links to other groups.
Term1 2004	Adjustments made to programs based on student feedback.	2004	Further processes for 'student voice' to be heard.
June 2004	First plenary meetings with parents. High levels of satisfaction.	March 2004	Strategy Evaluation think-tank established to develop terms of reference for evaluation. Broader skill development and perspectives.
June 2004	Leadership Team developed Outcomes and Objectives for Stage 5 (Years 9&10) Integrated Learning.	June 2004	Parent participation through plenary meetings increased knowledge and support of LNSGM. Advisors reported increased skills in working with parents and students.
June 2004	2005 Year Teams appointed from volunteer staff.	June 2004	Team manager position created to improve communication to/from other groups.
July 2004	NSW Board of Studies registration inspection successfully completed. LNSGM officially endorsed.		
July/August 2004	2005 Year Teams developed programs for Stage 4 (Years7&8) 2005 Integrated Learning.	September 2004	Middle managers worked on solving accommodation issues across the school. Increased skill development and broadened perspectives.
July-December 2004	Volunteer and invited staff developed frameworks for Year 9 Outreach 2006 program.	July-December 2004	Refinement of understanding of the holistic nature of Outreach by staff and administrators.
August-November 2004	Community evaluation of first year of implementation of LNSGM.	August-November 2004	Evaluation conducted by volunteer teachers. Increased skill development and broadened perspectives.
	Adjustments to LNSGM made in response to community feedback eg amount of time provided in Integrated Learning.		

**Table 6.5 Steps in developing the Loreto Normanhurst Student Growth Model and becoming a 'continually reinventing school, 2000-2004**

Figures 6.1 and 6.2, and Table 6.5, illustrate in graphic form how the school proceeded to implement the directions determined by the 2001 strategy process. The first priority was the need to develop a new holistic educational paradigm, and discussion of this process follows.

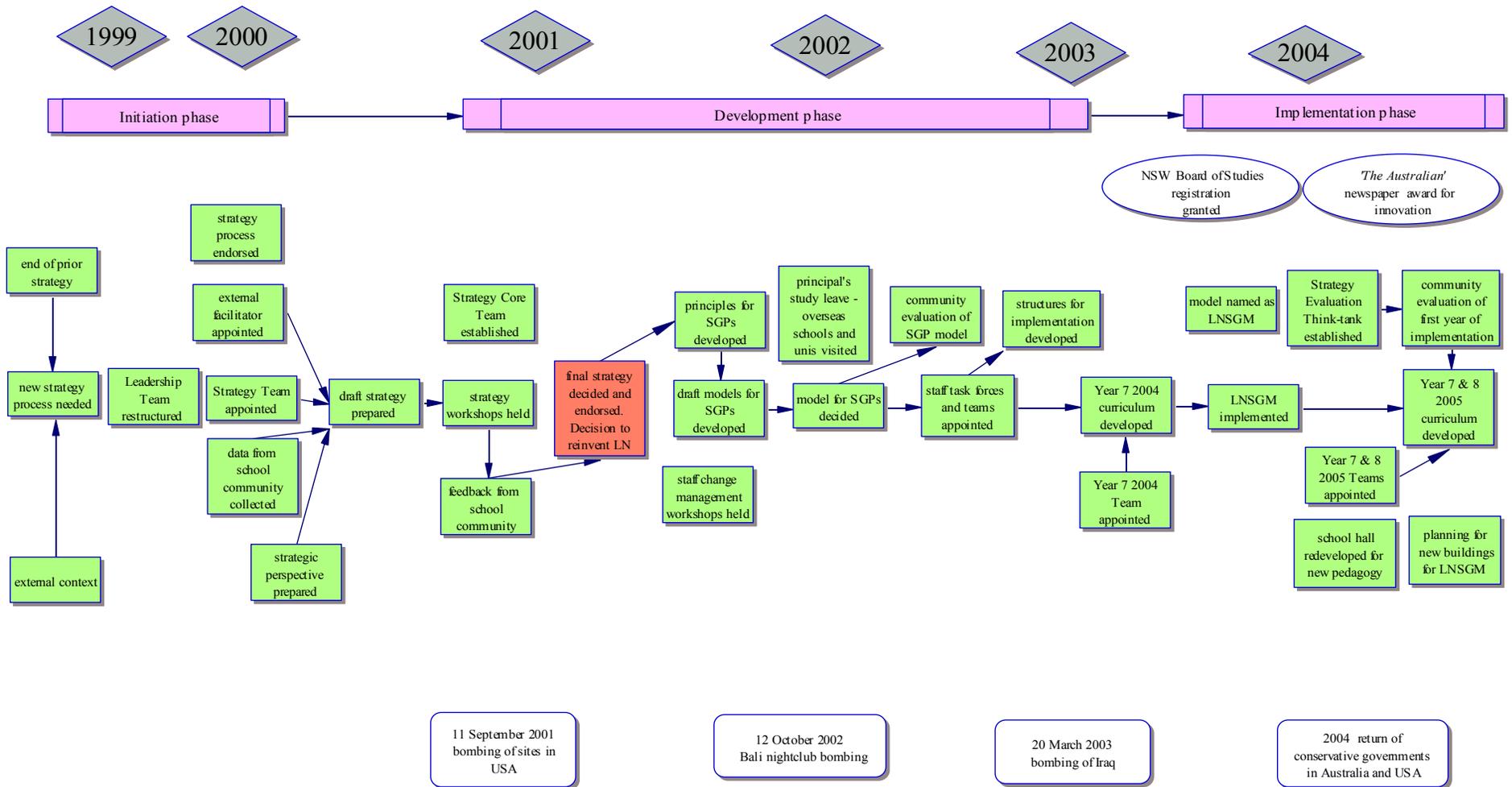


Figure 6.2 Steps in the reinvention process at Loreto Normanhurst

## Development of the Loreto Normanhurst Student Growth Model (LNSGM)

The strategy process had begun by identifying the needs of contemporary girls and linking these with a type of holistic education, informed by specific values and by 21<sup>st</sup> century learning theory and pedagogical methods. The remainder of this chapter consists of discussion and analysis of:

1. the chief elements of the LNSGM;
2. the process by which the LNSGM was determined; and
3. how the LNSGM fulfilled the school's aims of
  - a. meeting the needs of girls at the start of the 21<sup>st</sup> century;
  - b. retaining Mary Ward values; and
  - c. providing a holistic education.

By early 2002 the diagram shown in Figure 6.3 had been developed to illustrate how Student Growth Plans (SGPs) would operate. Although several aspects of this diagram would be refined in subsequent years, for example, KLA/Co-curricular/Faith formation/Community involvement was ultimately refined into the 'FACE' curriculum (see below), the essential elements, and overall emphasis remained constant. Overall, through her Student Growth Plan, each student would be drawn towards the aims of the school, as expressed in the Loreto Normanhurst Mission Statement (see Appendix 1).

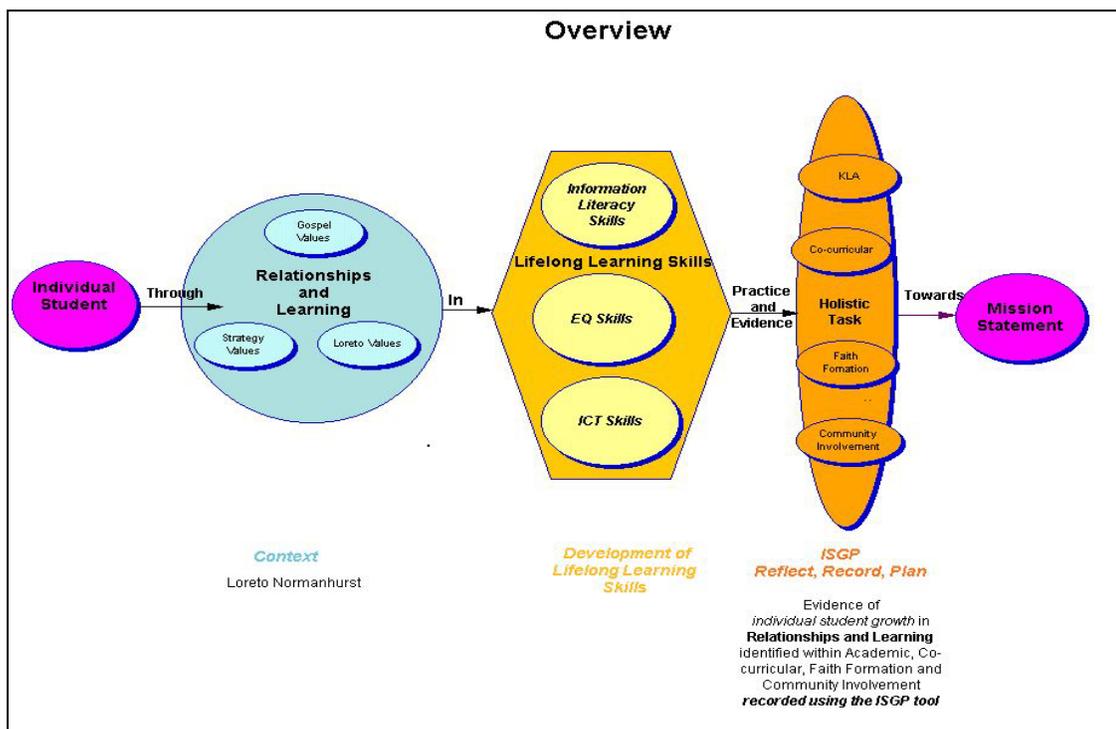


Figure 6.3 The Loreto Normanhurst Student Growth Model, as conceptualised in 2002

## **Elements of the Loreto Normanhurst Student Growth Model**

Each element of the LNSGM provided for the acquisition of skills and values for living as a 'fully alive human being', in the spirit of the words of Irenaeus in 185AD, 'the glory of God is humanity fully alive' (Roberts & Donaldson, 1885). Lifelong learning skills, including information literacy and technology skills, were seen as part of 21<sup>st</sup> century learning (Beare, 2001; McClelland, 1996; Meier, 1992; Starratt, 2003). Other essential elements included:

1. the Faith-Academic-Community-Extra-curricular (FACE) curriculum, constructed around students' holistic growth and learning. The FACE curriculum incorporated academic content and skills; the opportunity for students to reflect regularly on their faith and spiritual development; the pastoral curriculum and experiences of being part of and creating community; emotional intelligence skills; and participation in a range of extra-curricular activities such as sport and music;
2. Student Growth Plans (SGPs), individual plans for learning and growth, collaboratively constructed and maintained by each student together with her parents and advisor;
3. 'radical new pedagogy', student-centred, based on authentic curriculum, interactive pedagogy and authentic assessment (Costa & Kallick, 2000a; Gore, 2005; Starratt, 2004b; van Manen, 1991; Wiggins & McTighe, 1998);
4. an advisor system. Each student had an advisor, one of the eight Year Team members. The advisor, responsible for approximately nineteen students, knew these students well, worked with them in the open plan learning space which was shared by teachers and students, taught them both the integrated curriculum and at least one other subject, and connected with them in vertical House activities;
5. student-advisor conversations, in which a student reflected on her growth and learning, her goals and challenges, within the framework of the FACE curriculum, were conducted several times each term;
6. the digital portfolio – a piece of cyberspace within the school's computer network - developed by each student over the six years of her high school education. Within this, the student documented her regular student-advisor conversations, as well as her work in progress, her finished work, and short i-movies or Photostory projects which recorded her development. The intention was to give each student a copy of her digital portfolio – the cumulative record of her growth and learning - at the end of her school life. The digital portfolio was maintained on the 'My Site', which each student (and staff member) had by 2004, as well as an email account;
7. plenary meetings conducted with parents twice per year. Led by the student, plenary meetings were the forum in which she articulated her learning, illustrated

her metacognitive awareness using an artefact, either digital or material, which she had developed, and spoke of her goals and her challenges;

8. a program of Integrated Learning (IL), built around a unifying theme for each year (see Figure 6.3), which incorporated a range of life-long learning and emotional intelligence skills, and drew on the content of life – in the school, the world and anything in between. Demonstration of student learning was by means of carefully-scaffolded, but student-directed, holistic tasks;
  9. holistic tasks, which were long-term projects in which the student moved from developing the skill of asking the right types of questions, through the processes of finding, critiquing and organising information, to crafting data-based responses;
  10. differentiation of curriculum and pedagogy based on students' needs and interests; and
  11. academic subjects, such as mathematics or history, which continued to be taught separately (within a FACE framework), and incorporated where possible into IL.
- Despite the many innovative practices in the LNSGM, traditional academic disciplines remained.

### **The place of traditional academic disciplines in the LNSGM**

Traditional academic disciplines were seen as being intrinsically valuable, not only within the Mary Ward tradition (Orchard, 1985), but also because these were the basis of formal academic measurement at state level, and the means of access to tertiary education opportunities. The school remained academically non-selective, but had in recent years enhanced its academic profile through its HSC results, as Table 6.6 illustrates.

<b>Year 12 HSC</b>		<b>1995</b>	<b>1996</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
University Admissions Index (UAI)	% of Loreto Normanhurst students in top 10% of the State	20.5	23.9	21	18.3	42.9	38.8	45.5	43.5	33.6	38.1

**Table 6.6 School vs. State performance in the Higher School Certificate 1995 - 2004**

This improvement was attributed to professional development in a range of areas, especially learning theory and new pedagogies (I108), particularly since 1999, and through higher expectations on the part of staff, students and parents (Geraghty, 1999; Hunter & Jimenez, 2000; Mockler, 2001, 2003, 2004a), possibly linked to the antecedents of the reinvention process, as discussed in Chapter 2. It was important to maintain this measure of success. Part of the school's responsibility lay in providing its students with the maximum possible life choices through success in the public credentialling system, and it was also necessary in order to retain community confidence in the school. At the same

time, excessive emphasis on high academic achievement at the expense of the development of the whole person had to be avoided (Grace, 2002a; Wright, 1981, p.57, 68). The LNSGM was intended to be a 'both-and', not an 'either-or' approach.

It incorporated the academic disciplines within Key Learning Areas (KLAs), and marked a gradual progression, based on personal growth, over a student's high school years. The holistic framework was based on a series of overarching concepts considered to be particularly relevant for each stage of a student's development. Figure 6.4 shows how these themes progressed. For example, whereas in Year 7 the theme was 'Identity', in Year 9 it was 'Outreach', which would entail students, as part of their formal learning, spending two weeks in a distant location where they would interact with each other in community and activities, with Aboriginal people and communities, with the beauty of the landscape, with themselves and God in personal and spiritual reflection opportunities. Traditional academic studies would also be undertaken 'in the field', in an experiential learning approach (Kolb, 1984). (Note: the term 'Stage' refers to an Australia-wide articulation of stage of development. Stage 4, for example, included Years 7 and 8, Stage 5 describes Years 9 and 10, and Stage 6, Years 11 and 12).



**Figure 6.4 An overview of the integrating themes of the LNSGM from Year 7 to 12, 2002**

It is important to understand, however, that the development of the LNSGM was gradual. It required many hours of thought, discussion and debate over several years. The task of developing this new educational paradigm began, in fact, with processes of discernment, in keeping with the school's Ignatian spirituality traditions (Cameron, 2000; Orchard, 1985).

## Processes of discernment and development

2001, the first year of development of the LNSGM, involved a wide range of community input, particularly from staff. A systematic approach was adopted, the first step of which was the identification of key principles which would inform the development of possible holistic models of Student Growth Plans. Forty-four volunteer staff members were involved in developing the ten key principles listed in Table 6.7.

<p>Student Growth Plans at Loreto Normanhurst were to:</p> <ol style="list-style-type: none"><li>1. be informed by the <b>Loreto values and our strategy core values</b>;</li><li>2. be about <b>holistic and lifelong education</b> –with clearly articulated outcomes across all learning areas (academic, metacognitive, spiritual, emotional and social);</li><li>3. provide opportunities for <b>authentic parent involvement</b> in student learning;</li><li>4. incorporate <b>flexibility</b>;</li><li>5. emphasise <b>interdisciplinary and cross-disciplinary studies</b>;</li><li>6. use <b>Information and Communication Technology</b> as a tool for learning and administration;</li><li>7. incorporate <b>teacher learning and reflection</b>;</li><li>8. be founded upon the <b>recognition of individual differences and valuing of diversity</b>;</li><li>9. provide opportunities for students to work with an adult in a <b>coach/tutor capacity</b>.</li><li>10. be based on <b>student ownership and negotiation</b> of learning programs.</li></ol>
--

**Table 6.7 Key principles underpinning Student Growth Plans, September 2001**

The process of development of the LNSGM resembled Joyce's (1991) framework, which combines:

1. Collegiality. Cohesive and professional relationships were developed between staff (and the community) to create a culture that embraced broad, vision-directed improvements as well as day-to-day operations (without the relationships becoming an end in themselves);
2. Research. Staff were acquainted with the findings of school effectiveness research (particularly through strategy strengthening workshops) and research into teaching methods which were then used to define local problems and identify solutions;
3. Site-specific information. Staff were encouraged to collect and analyse data about their students, schools (their own and others) and the effects of change efforts (informally and through systematic evaluation);
4. Curriculum initiatives. Change was introduced within and across subject areas; and
5. Instructional initiatives. Staff development in teaching skills and strategies, for example generic teaching skills, repertoires of teaching methods, specific approaches or styles, and an 'academic pastoral care' approach was provided.

Over the years 2001 to 2004 individuals, teams, and the school community as a whole, struggled to work out the meaning and implications of holistic Student Growth Plans. One school leader described the struggle thus:

[It's] been really exciting. And it's been a real privilege to work with people and to see that [new educational ideas being put into practice] happening...

[But] it's been terrifying sometimes, when we've known that we haven't really known exactly which way we're going to go, and to try and hold it together so that the rest of the staff felt confident and comfortable in following us when, you know, we're kind of beating the path of change as we walk it. (I108)

This evolution, through an ongoing process of clarification (Fullan, 2001; 2004), is discussed in the next section.

Following the development of a shared understanding of the basic principles, all staff were invited to develop a potential model for delivering Student Growth Plans. The nine which were presented underwent a series of critiquing and combination exercises, before one final draft model, a composite of earlier models, was developed. This draft model was submitted to rigorous evaluation, including a community consultation led by an external academic in May 2002 (Groundwater-Smith, 2002). Ideas had also been sought from the literature (ChP13) and from a series of school visits within Australia and overseas, particularly those undertaken by the principal/researcher as part of her study leave in 2002. The evolution of the Model was apparent within the report of the community consultation in which frequent reference is made to 'independent education/learning'. These terms were gradually replaced by 'student-directed' and 'holistic' learning. In fact, following the publication of this report, it was decided to abandon the term 'Individual Student Growth Plans' (ISGPs) in favour of 'Student Growth Plans' (SGPs), in order to avoid the false impression that students would be working alone.

After the LNSGM was endorsed by the Strategy Team and the School Council, work continued on refinement, and creation of the first Integrated Learning programs, and on identification of the structures that would need to change. Parent and student voice was factored in throughout the process by means of workshops, and Strategy Team membership. This process of development continued throughout 2003, with the work of the Implementation Team, Heads of Department (HoDs), House Coordinators (HCs) and the Year 7 2004 Team of volunteer teachers. This Team would be the inaugural advisors, and were appointed in May 2003, after a rigorous selection process. A significant aspect of the new paradigm, on which a range of teams worked, was the incorporation of 'radical new pedagogy' throughout the school.

### **'Radical new pedagogy'**

In 1999 an external education consultant had made a significant impact on teachers (I108), helping them to see that students had different ways of learning. However, as discussed earlier, the 2000 student surveys identified that the school still catered more for dependent learners than for independent or collaborative learners. The 2001 strategy set the goal of

developing Student Growth Plans for every student and, by 2002, the term 'radical new pedagogy' was in use. This was a contentious term, as the following comments illustrate:

I think it's really interesting how in the first few weeks of my being here, I noticed...the word 'radical' came on.... Are we radical? And there was a complete fluff...'No, we mustn't use the word radical, we're not radical.' And it actually confronted something about the image of the place, you know, we're [educating] nice girls to marry nice boys, it wasn't that we wanted to be radical (laughter). (IF08)

There was ongoing and often heated discussion of the term 'radical' (J200303; IF08). Some HoDs disliked the term, believing it contained an implied criticism of current teaching and learning, and so did the Implementation Team, who wanted to replace it with 'exciting' or 'innovative' in order not to scare staff. The Implementation Team considered that SGPs needed to be 'marketed' to staff, some of whom were experiencing anxiety and unrest about their jobs (J200303). Despite this, the Leadership Team determined that the term 'radical' would remain, and would be included in the advertisements for the inaugural Year 7 2004 Team members, as the following quote from a member of the Leadership Team explains:

It is honest to keep it in, as the change IS radical...If we remove the word, and yet speak about radical, it is a disconnect. (J200303)

By the following month, the angst about 'radical' seemed to have subsided, as this entry in the researcher journal indicates:

We worked through the Year 7 Team member advertisement and conditions. The Implementation Team is now 'over' the radical issue...they see it as honest to describe the new ways with this word. It helped when they saw the article about the Australian Science and Mathematics School [an innovative school visited by the principal and some other staff] in Adelaide. (J200304)

'Radical new pedagogy' was more than incremental improvement but a profound change in what was taught, how it was taught and assessed, and in the relationships between teacher, learner and parent. It implied several things:

1. a move away from teacher-directed to student-directed learning. A constructivist approach to learning and knowledge creation was adopted (Piaget, 1972; Vygotsky, 1978), with the emphasis on students and teachers making meaning of their experiences. The work of Costa and Kallick (2000a) assisted in identifying and incorporating habits of mind, and was expanded to include habits of both mind and heart (G. H. Wood, 1992). Learning scaffolds were developed and posted on the school's intranet, where they were accessible to all students and staff of the school. The regular student-advisor conversations required students to reflect on their learning. Students in Year 7 (and their parents) thus became accustomed to

speaking of their learning, acquiring and using the 'language of growth' and metacognition (See Figure 6.4);

2. authentic learning. Starratt's (2004b) work on authentic and transformational learning within the context of a Catholic Christian school was incorporated as part of 'radical new pedagogy'. Such an approach emphasises both meaning and relationships in an ethical and moral approach to learning;
3. a different approach to curriculum design. The work of Wiggins and McTighe (1998), in which curriculum is developed by 'backward design' from desired learning outcomes, was adopted. Particularly in the development of programs for Integrated Learning, teachers became accustomed to working backwards from the desired outcomes, to identifying assessment processes through which students could demonstrate their learning, or mastery of those outcomes, and finally to designing appropriate learning activities and experiences. The Queensland Government's *Productive Pedagogies Project* (Department of Education and the Arts, 2001) was also helpful, especially the 'Rich Tasks' it incorporated, which required teachers to identify the 'enduring understandings' that students were expected to acquire from these tasks;
4. incorporation of holistic elements. 'Radical new pedagogy' also meant that teachers were expected to be teachers of students, not just teachers of subjects (van Manen, 1991). This meant greater emphasis on relationships, and the development of emotional intelligence (Goleman, 1996). Care for each student as a whole person was seen as the responsibility of every staff member, and active support of the school's values was expected. For example, every advisor, not just teachers of Religious Education, discussed issues of faith development in each student-advisor conversation.

Development of a 'radical new pedagogy' approach was gradual and challenging. Some teachers were nervous, not just about the term 'radical', but about the radical nature of the new approach, as this survey comment illustrates:

I think overall, for many, this is a threatening process. Many have been doing 'this' for years and are, in essence, very good at what they do - I feel some are unsettled by what is taking place and feel uncomfortable with how it affects them/ may 'reflect' on them as 'good' teachers. Perhaps many are not ready to embrace change - yet this is such a fundamental part of being a teacher today. I think some look towards the 'reinventers' as being a bit too radical/ 'out there' etc. (T28)

There were other tensions in the management of the new approach. On the one hand, one member of the Leadership Team was very concerned that, for Year 7, only 33 per cent of total teaching/learning time (reduced in 2005 to 25 per cent) was to be devoted to

Integrated Learning (J200308). On the other hand, HoDs were concerned at the reduction of class time for their subject areas, and wanted more subject-specific outcomes to be met within Integrated Learning programs (J200311). Team members tried to accommodate these subject-specific outcomes into the Integrated Learning programs and, in so doing, moved away from some aspects of the 'radical new pedagogy' of the Integrated Learning program, particularly the intention to use the 'stuff of life' as content while incorporating life-long learning skills from informational literacy, EQ and ICT (J200410). These skills were considered pivotal.

### **Life-long learning skills**

Life-long learning skills are variously defined. The UNESCO report 'Learning: the Treasure Within' (Delors, 1996) referred to in Chapter 2, identifies four essential pillars of learning, all of which are broader than traditional academic learning:

- Learning to know
- Learning to do
- Learning to be
- Learning to live together.

Learning at Loreto Normanhurst incorporated all of these pillars through the FACE curriculum. As illustrated in Figure 6.3, lifelong learning would be enhanced through incorporation of ICT skills, information literacy skills and emotional intelligence (EQ) skills.

### **Incorporation of ICT into teaching and learning**

Although a few equated the use of technology as the simple transfer of worksheets into digital format (J200305), the majority of teachers respected and used ICT as a valuable way to enhance learning. Staff surveys in 2000 identified the school's strength in ICT as one of the four major reasons for the school's success at that time (see Table 6.4), and the 2004 surveys revealed that staff considered the school's focus on ICT as one of the major factors which helped the school to reinvent itself (see Table 7.7).

Through the Loreto 5 professional learning innovation (see Chapter 2), teachers acquired significant ICT skills, combined with learning theory, and developed digital resources for their faculty. Student learning and assessment were heavily reliant on ICT through such processes as webquests, use of PowerPoint, access to learning scaffolds, and use of 'My Sites' for storing and sharing work. Students and teachers often exchanged work via email and students sought resources through the internet or information from individuals, including the principal/researcher, via email. Further, records of student-advisor conversations were maintained digitally, thus enabling students to reflect on their own

growth over their years at the school. ICT was seen as an essential tool for learning, and so too was information literacy.

### Information literacy

Information literacy is the term used to describe the organised approach to teaching students how to locate, organise, evaluate and use information. The Learning Resource Centre (LRC) staff created many scaffolds for learning, which were available digitally to all staff and students, and used by many. Figure 6.5 illustrates one such resource from the LRC website.

About the LRC	Education Services	Information Literacy	Learning Resources
<a href="#">Email</a>	<a href="#">Literature</a>	<a href="#">Assignments</a>	<a href="#">Athena Catalogue</a>
<a href="#">FAQ</a>	<a href="#">Other Libraries</a>	<a href="#">Blooms Taxonomy</a>	<a href="#">Creating Bibliographies</a>
<a href="#">Introduction</a>	<a href="#">Periodical Collection</a>	<a href="#">Evaluating Sites</a>	<a href="#">Infocus</a>
<a href="#">Staff</a>	<a href="#">Professional development</a>	<a href="#">Framework for Authentic Learning</a>	Inspiration
	<a href="#">Role of Teacher/Librarian</a>	<a href="#">Information Skills</a>	<a href="#">Online Newspapers</a>
	<a href="#">Standards packages - HSC</a>	<a href="#">Learning Scaffolds</a>	<a href="#">Online Services</a>
	<a href="#">Teaching and Learning</a>	<a href="#">Learning Styles</a>	<a href="#">Pathfinders</a>
	<a href="#">Tutorials</a>	<a href="#">Questioning toolkit</a>	<a href="#">Rosemary Horton's Website</a>
		<a href="#">Rubrics</a>	<a href="#">Text Types</a>
		<a href="#">Search Engines</a>	<a href="#">Webquests</a>
		<a href="#">Search Strategies</a>	<a href="#">*Year 9 French</a>

Last Updated:  [LRC Home Page](#)

Figure 6.5 Learning scaffolds accessible from the Loreto Normanhurst website ([http://www.loretonh.nsw.edu.au/LRC/LRC\\_Grid.htm](http://www.loretonh.nsw.edu.au/LRC/LRC_Grid.htm))

The LRC, which incorporated but expanded the role of a traditional library, was a hub of learning, the central 'brain' of the school, and connected by ICT to all members and physical parts of the school. LRC staff, working with members of the Leadership Team and HoDs, worked to ensure that information literacy skills were passed on to staff, practised among students and embedded within teaching/learning programs, especially the Integrated Learning programs.

Yet, within a holistic paradigm of education, not only were ICT and information literacy skills regarded as key life-long learning skills. The development of emotional intelligence skills was considered paramount for life, particularly in a school which valued both relationships and learning.

### **Emotional intelligence (EQ) skills**

The Gatehouse Project (Patton et al., 2003), an Australian university-based program which assists school communities to create and maintain positive climates in which students can learn and grow, proved most valuable as a means of identifying and reinforcing EQ skills. The Gatehouse program is built around three concepts: security, connectedness and positive regard. Involvement in the program required all Year 8 students to complete a survey about how they experienced school life at Loreto Normanhurst. These data were analysed by Gatehouse researchers and fed back to the staff. Professional development, which enhanced staff awareness of the issues and provided helpful strategies, was also provided by the researchers, and emphasised:

- calling students by name, and connecting with them as individuals, even when taking a roll;
- avoiding the temptation to trade passivity and neatness for good marks (see also Sadker & Sadker, 1994);
- avoiding doing *for* girls what they needed to struggle through for themselves; and
- providing them with ICT skills to offset the 'alarming technological divide' between boys and girls (Weinman & Haag, 1999);

Emotional intelligence was understood to encompass a wide range of personal and interpersonal skills and capacities such as self-awareness, reflectiveness, empathy, the ability to work in a team, organisation skills, goal-setting, resilience, self-control, the ability to delay gratification, negotiation and conflict management skills. Emotional intelligence was seen as essential not only for living in community but also for effective learning and engagement in extra-curricular pursuits.

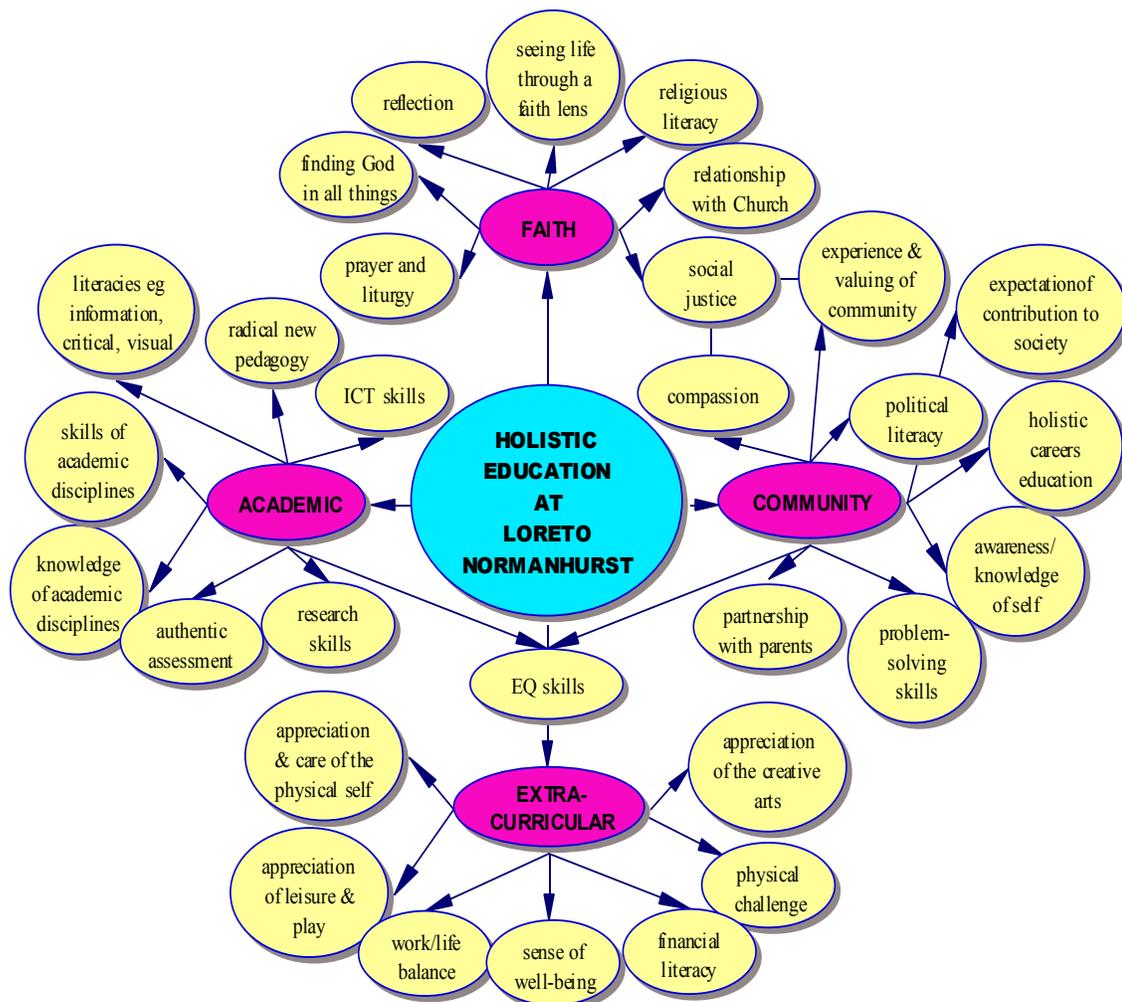
A range of literature provided a theoretical basis for emotional intelligence strategies, for example, the OECD report of the project on Learning Sciences and Brain Research:

Emotions have a profound impact on our memory and learning... However, throughout history, emotions in the classroom have been strict taboo, and yet most teachers today would agree that students participate in class and learn best when they feel good about themselves and their lives. (Centre for Educational Research and Innovation, 2003, p.3)

Further professional development on how girls learn (Deak, 2002; 2003; Needham, 2003), as well as EQ, was provided for staff (J200101-05; J200105-12; J200203-04). Similar

opportunities were offered to parents. The aim was to strengthen links between the school and parents and to assist parents in the task of raising adolescent girls in new times.

Finally, after three years of preparation, the LNSGM was implemented from the start of the 2004 school year with all Year 7 students, in a newly refurbished learning area created from the former school hall. Figure 6.6 presents an overview of how the school interpreted holistic learning, and is presented as a summary. A DVD (Appendix 20) and a brochure developed by the school (Appendix 19) provide further detail of how the school, and the Loreto Normanhurst Student Growth Model, was operating at the end of 2004.



**Figure 6.6 Holistic education at Loreto Normanhurst**

Although within the first month an implementation dip (Fullan, 2001) occurred (see Chapter 7), by mid-2004 the LNSGM was underway and stabilising. Ongoing evaluation was important. The next section addresses the extent to which the school succeeded in its aims of meeting the needs of 21<sup>st</sup> century girls and of retaining its Mary Ward values.

## ***How successful was the LNSGM?***

The essential question to answer was the extent to which the Loreto Normanhurst Student Growth Model delivered the holistic education envisaged in the strategy process. The answer to this question will, to a large extent, answer the research sub-question 'How successful was the school in meeting the needs of girls at the start of the 21<sup>st</sup> century through the reinvention?'

The external strategy facilitator argued for a single 'metric' by which the success of the LNSGM and the reinvention of the school could be measured. This was resisted by the Strategy Team as inappropriate in a school situation, a further example of how a facilitator from a non-educational background caused school community members to articulate and challenge assumptions. The LNSGM was concerned with the growth and development of human beings (J200302), which is primarily judged qualitatively rather than measured numerically.

Several criteria by which the success of LNSGM could be judged were, however, identified by the Strategy Team in 2003 (J200302). These were:

1. evidence of learning and growth through the student's digital portfolio;
2. parent, student and teacher evaluations;
3. individual students' academic results in external, moderated examinations, especially the HSC, aligned with measures of their overall ability and patterns of improvement;
4. the school's overall results in external, moderated examinations, especially the HSC;
5. the quality of students' lives as adults (particularly the extent to which the school's values were in evidence). (Strategy Team meeting minutes, February 2003)

At this stage of implementation, it was too soon to judge the last three criteria. It needs to be noted, at this point, that the intellectual ability of the 2004 cohort of Year 7 students, coincidentally, was lower than that of previous years. Each year, all incoming students sit for a diagnostic test conducted by an outside organisation (Allwell), which identifies ability on a range of measures. Across Australia each year, some sixty thousand students sit for this test, providing a reliable level of moderation. As Table 6.8 indicates, whereas in previous years, generally more than one third of students entering the school had high levels of general reasoning ability (IQ), the proportion of able students in the Year 7 2004 cohort was significantly lower. No obvious cause for this phenomenon was apparent, but the lower overall ability of the group poses a greater challenge for the achievement of high academic results when this group sits for the Higher School Certificate.

Year 7 Allwell test results	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
	%	%	%	%	%	%	%	%	%	%	%
<b>General reasoning</b>											
High	44	41	39	42	45	38	42	47	42	33	28
Average	55	55	58	53	51	59	56	45	55	62	64
Low	1	4	3	5	4	3	2	8	3	6	7
<b>Maths performance</b>											
High	44	44	39	38	31	35	34	44	39	33	25
Average	53	55	58	56	68	63	65	50	57	63	69
Low	3	1	3	6	1	3	2	6	4	4	6
<b>Reading comprehension</b>											
High	56	49	44	50	40	45	54	49	49	35	28
Average	43	47	51	48	58	53	46	43	45	59	66
Low	1	4	5	2	3	2	0	8	6	6	6

**Table 6.8 Comparative results of diagnostic tests prior to starting Year 7 1994- 2004**

In this study, seven factors provide evidence of the extent of the success of the LNSGM.

These are presented as follows:

1. the evidence and reactions of Year 7 2004 students and Team members;
2. the extent of satisfaction of parents and students throughout the school;
3. data from the school's evaluation of the first year of implementation of the Model;
4. the extent to which the Model incorporated contemporary learning theory;
5. the extent to which the Model met the needs of 21<sup>st</sup> century girls;
6. evidence from areas beyond the school; and
7. the extent to which the Model retained Catholic and Mary Ward values.

### **Evidence and reactions of Year 7 2004 students and Team members**

At the July 2004 meeting of the Strategy Team (J200407; strat plan15), several Year 7 students and Team members spoke of their experience of the LNSGM. This was an *ad hoc* discussion, and these volunteer students, randomly selected by the Year 7 Team, had been notified only that morning of the meeting with the Strategy Team. The students spoke of:

- the plenary meetings  
[They are about] how we're going in all areas of school life. You take charge and your advisor prompts you. I like taking charge; and
- the advisor system  
Your advisor gets to know you like you were a person, and it helps you to know who you are.
- the Integrated Learning program. One student explained that she found this enjoyable and gave details of how subject specific skills eg graphs were incorporated, of the use of thinking tools such as PMIs (plus/minus/interesting), and of how independent learning was a feature of both IL and other subjects.

When asked by a Strategy Team member if the Integrated Learning program was boring, one student acknowledged that some girls could not see the point. However, she described how her mother was able to list for her all the things that she [the daughter] could now do better. (This comment also revealed informally the parent participation involved.) Another student suggested that

some people don't like the amount of reflection, but it is useful because you look at it and you know yourself...how you've done. You don't have to rely on the teacher to tell you. This will prepare us well for Year 10 and senior years.

This is an important insight, revealing issues of identity and developing self-confidence, as well as the ability to undertake longer-range thinking. Such insights are skills for life, not merely assets for future senior study.

Asked 'what's hard about the LNSGM?', the students offered these insights:

- You have to set your own Maths homework. (Students were required to do four weekly homework sessions, each of twenty minutes, with timing and content decided by the student);
- You have to use your management skills, and prioritise;
- You think 'What can I do better next time?' now I know my mistakes [citing as an example her Design and Technology folder].

Members of the Year 7 Team contributed their insights after the students had left:

- They [students] struggled with the concept of Integrated Learning because it's so different...long-term goals; self-awareness and reflection skills...'who they are as a person'. [Their] time management skills are better than many when they start at uni;
- Somewhere this term something has clicked...they [students] can see the links. The click came when the girls saw the benefits. There was a huge groundswell of negativity towards Integrated Learning and that has now changed;
- There is a sense of community in Year 7. House-based advisory groups lead to a strong sense of bonding with the House. Kids respond to advisors as whole people;
- It's been a steep learning curve...something has happened between Term 1 and Term 2...students and staff have turned the corner. [It was later explained by a Team member that Term 1 was still too teacher-centred, but that the approach in Term 2 was structured differently.] It's clearly working as it should...it's obvious that ongoing evaluation is leading to some modifications being made;
- The strength is really the student-advisor conversation plus Integrated Learning and the relationship that develops because of that intersect.

Team members related anecdotes (van Manen, 1991) about the way in which students were able to transfer the skills acquired in Integrated Learning into other subjects, and they also raised issues that had yet to be resolved, such as the need to stage the life-long learning skills more effectively across Years 7 to 10, the need for better synthesis between Integrated Learning and academic subjects, the need for more differentiation within Integrated Learning and the difficulty of scheduling student-advisor conversations.

Year 7 Team members were asked why all members had volunteered to continue as Team members in 2005. Responses included:

- The kids; the Team environment; having time set aside to listen; knowing kids in a broader sense;
- I had a love affair with the principles behind this. I have to be a part of this...the creation of something;
- I caught myself 'on the floor'<sup>2</sup> realising how many life skills are being added. The Integrated Learning program is opening their eyes to issues, the impact of videos, teen mags, for example. How fortunate I am to see the development in these children in six months;
- The Model is doing things I didn't think could happen in school...higher order questions/ statements than I ever encountered before. Kids are interesting to talk to, ask probing questions. On excursions they ask 'out-there' questions...have big, enquiring minds, are curious, inquisitive. This is remarked on by outside people at the excursion venues.

Members of the Strategy Team were impressed by the comments of the Team members and especially by the students' observations. The opportunity for the Strategy Team to join Year 7 students during an Integrated Learning session reinforced their positive views (J200407). One member (KI-01) expressed admiration that such young students could see and articulate the transference of skills they were developing through the LNSGM. Although some other staff (not Team members) reported that some students had complained that Integrated Learning was boring or just like primary school (IF03), it was evident to the Strategy Team members that most students understood and could explain what they were doing, how they were approaching their work and why it was important, and showed high levels of engagement (J200407). This view was further reinforced by the students' performance in plenary meetings.

Plenary meetings were designed as the vehicle through which students presented evidence of their learning and growth to their parents and advisor. After the mid-year plenary meetings in 2004, the vast majority of parents expressed positive views in the formal evaluations of the plenary meetings. Further, in subsequent conversations with their daughter's advisor, other staff members, or the principal/researcher, many parents expressed admiration for the way in which their daughters had grown in maturity, skills, and confidence (J200406). Similar feedback from parents was gained after the year-end plenary meetings.

During plenary meetings, students were required to demonstrate their digital portfolio (My Site) and to discuss an artefact they had produced. These artefacts had been evaluated

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<sup>2</sup> 'on the floor' was an expression used to denote when a Team member was engaged in active teaching and learning activities with students, as opposed to being present in the learning space but engaged in student-advisor conversations or preparation and marking.

by the student, her peers, and her teachers, against a previously developed rubric, which the student explained to her parents. Throughout the course of the year, advisors monitored students' 'My Sites', and developed professional judgements about the progress of their students. Their conclusions about the extent of student growth were favourable, and teachers generally observed that Year 7 2004 students were qualitatively different learners from their predecessors (J200411; J200412). This was significant, given the general ability of this cohort of students.

At various stages in 2004, Year 7 Team members also spoke of the professional benefits accruing from the LNSGM. These included:

1. The confidence and comfort of students and the ability to know them better as people, as this comment illustrates:  
Often Year 7s I've never met walk up to me...They're really happy. (IF01);
2. The sense of connectedness between students, and connectedness to the House communities and structures (IF01);
3. The joy of peak professional experiences, as described in the following comment:  
You get that little crick at the back of your neck...this is working and this is exciting and it's so good and interesting (IF01); and
4. The collegiality of working in a tightly-knit, professionally-focused team which broke down faculty barriers (IF01) (Mockler et al., 2004).

For some other staff, however, that collegiality was perceived as a problem, distancing Year 7 Team members from other members of staff and weakening faculty groupings (IF10) (Mockler et al., 2004). When this issue was addressed with the Team it provoked a defensive response:

Yeah, OK, it's unhealthy. Who's going to come and deal with it when we all go out visiting and then 150 kids rock up with nothing to do the next day. (IF01)

This comment also indicated a tendency towards teacher-directedness, a challenge throughout the first year of implementation, which was gradually overcome, as the minutes of weekly Year 7 Team meetings in 2004 illustrated. However, there were other significant stakeholders whose views were important in assessing the success of the LNSGM, including students and parents in Years other than Year 7.

### **The extent of satisfaction of parents and students throughout the school**

One of the challenges of the strategy and reinvention processes was to continue providing the best possible education and care for students already in the school, while planning, from 2001, for those who were yet to come. At times, students in senior years expressed concern that they were being overlooked (IF09). Yet an analysis of Year 12 exit survey responses, from 1999, the year these anonymous surveys were first analysed, until 2004, indicates that these students were very satisfied with their school experience. Rather than

a lowering of satisfaction levels during the years of preparation and implementation of the LNSGM, satisfaction levels rose. Table 6.9 shows Year 12 students responses, on a Likert scale, to one of the key questions in the survey, 'How satisfied were you with the quality of the education you received at Loreto Normanhurst?' (A seven-point Likert scale was used, but so few students were dissatisfied that their responses were aggregated under 'Dissatisfied'.)

% of Year 12 exit survey respondents expressing satisfaction with the school.	Extremely satisfied	Very satisfied	Satisfied	Total % satisfied	Not sure	Dissatisfied	% response rate
1999	4	59	33	<b>96</b>	3	1	n/a
2000	26	48	18	<b>92</b>	3	5	45
2001	24	58	18	<b>100</b>	0	0	65
2002	40	43	17	<b>100</b>	0	0	33
2003	29	49	16	<b>96</b>	2	2	34
2004	47	46	7	<b>100</b>	0	0	48

**Table 6.9 Student satisfaction with the school, from Year 12 exit surveys 1999- 2004**

Parent satisfaction levels were similarly high during these years, as measured in anonymous parent satisfaction surveys provided to all parents with daughters in Year 7, 10 or 12. Satisfaction levels ranged between 98 and 93 per cent, indicating that the school appeared to have retained the confidence of parents already in the school, during the years of preparation of and transition to a whole new paradigm of education, a period of understandable nervousness in parents.

### **Data from the school's evaluation of the first year of implementation of the Loreto Normanhurst Student Growth Model (LNSGM)**

The school's evaluation of the first year of implementation of the Loreto Normanhurst Student Growth Model included focus group interviews and surveys of all staff, Year 7 2004 students and their parents. Data from these sources revealed that 'the majority of key stakeholders are supportive of the Model, feel benevolent about its potential achievements and are keen to develop it in a positive way' (Mockler et al., 2004, p.4). There was general agreement that Integrated Learning provided students with new skills although many questioned whether the time spent was commensurate with the amount of skill development. (Following this evaluation, the decision was made to reduce the amount of Integrated Learning time in Year 7 from 33 to 25 per cent of total teaching/learning time.) There was positive support for the relationship with advisors and the student-advisor conversations, and also for the plenary meetings in which students demonstrated their learning to their parents and advisor (J200411).

The report also identified concerns of stakeholders:

- Teachers' concerns about the loss of Subject-Specific time have had a far reaching impact on other groups (i.e. students and parents), manifested in many cases as a heightened and sometimes disproportionate anxiety.
- There is significant confusion and lack of clarity about the aims of the Model, the relationship between integrated and Subject-Specific learning and reasons for the Model from members of all key stakeholder groups (Mockler et al., 2004, p.4).

Identification of these concerns led to further development of the LNSGM and processes for information and clarification.

### **The extent to which the LNSGM incorporated contemporary learning theory**

Authentic learning experiences were provided for students (Starratt, 2004b) within a 'quality teaching' environment. The impact of authentic learning on student learning is well documented (for example, Gore, 2005). Gore considers authentic learning as comprised of three factors: what is learned must be material of significance, and therefore authentic; it must demand intellectual quality; and be delivered within a quality learning environment, characterised by respect for teachers and students, heeding contemporary demands of work, citizenship and personal affairs, and stimulation of professional community.

Students were provided with scaffolds for a range of skills in such areas as information literacy, note-taking, construction of expositions, and ICT skills were constantly referred to and used in the course of work in Integrated Learning time (Costa & Kallick, 2000a). They were actively involved in assessing their work and in evaluating their programs, including the LNSGM itself (Mockler et al., 2004). They also developed understanding of themselves as learners, accessing and utilising information on brain research and preferred learning styles. In many ways, they were co-learners with their teachers, making meaning of their experiences (Piaget, 1972; Vygotsky, 1978). Certainly, this was the principal/researcher's experience when she worked 'on the floor' each week with Year 7 students and their teachers in 2004 and 2005.

The views of two members of the Strategy Team provide an illustration of the changes in the approaches to learning, culminating in the LNSGM:

When I came here a fairly long time ago, I thought there was a very strong conservative streak in the school. I'd come from [another] school, and I remember walking past here in the first couple of days and there were teachers dictating to their class, and the girls were writing it down, and I hadn't seen that for years and years and years...[Y]ou know, there's been a lot of work done in those last [many] years to get us to where we are [now].  
(IF08)

I remember thinking that there were all these exciting things to do at Loreto and all these exciting ideas about change and all that, but just getting so frustrated about the learning environment, how it was so boring. I used to get really bored. And as I walked into that classroom today and I see the kids having fun and all these interesting things going on...in my head it's aligned a bit more. It's like what was being preached is actually happening a bit more. (IF08)

Further, the flexibility offered by 'that classroom', the new learning space, the Deirdre Rofe Centre (see Figure 6.7), enabled a degree of self-direction not possible in a traditional classroom space (Bunting, 2003; Stuebing, 1995). Some students needed time to become accustomed to this new space, but by April 2004, a focus group of Year 7 students (IF01) reported that Year 7 students generally had managed to work effectively in the new facility and were more self-directed. Management of such issues was assisted by the regular student-advisor conversations, and by the ongoing relationship with the advisor, who taught and interacted with the students in their care on a daily basis.



**Figure 6.7 The Deirdre Rofe Centre – a learning space to support holistic learning**

Student-advisor conversations, and the daily interactions between teachers and students, also helped students to develop further emotional intelligence skills, a significant aspect of

effective learning in the 21<sup>st</sup> century (Beare, 2001; Hargreaves, 2003b). By these means, teachers helped individual students to address issues such as poor organisation, how to work in teams, how to set goals and defer gratification, thus developing self-control, and how to cope with negative feelings or address conflict within a group. Parents' (IF04), students' (IF11) and staff (J200407; IF01) comments confirmed this (see also Mockler et al., 2004). Further, through the content of Integrated Learning programs, particularly the emphasis on social justice, students were helped to develop awareness of the needs of others, compassion and self-awareness. The sense of security provided through being individually known, and personally cared for, assisted in learning outcomes. Students themselves, and their parents, reported this (IF05; IF06; IF01).

A sense of citizenship (Beare, 2001; Handy, 1995), particularly within the school, was brought about by Year 7 students' involvement in 'Loreto traditioning', where they were enculturated into the school's history and traditions, and their active role as 'tour guides' on Open Day. These activities led to a sense of connectedness, such that students would refer to what they wished their daughters to experience when they eventually were enrolled in the school. It was this sense of being an active participant in history which was empowering for students as learners and pivotal for girls in having a sense of identity, purpose and connectedness to something beyond themselves.

Connectedness was one of the three principles on which the Gatehouse Project (Patton et al., 2003) was predicated. This program continued to inform the sense of 'academic pastoral care' to which the principal/researcher often referred as the ideal balance in a school. In late 2004, all Year 8 students were surveyed using the same instrument applied in 2001 with the Year 8 students that year. Comparison of the survey results of 2001 and 2004 revealed significant changes in how Year 8 students experienced the Loreto Normanhurst environment, endorsing the view that the school had made significant strides in providing a holistic approach to student learning and growth, and increased levels of security, connectedness and positive regard. Table 6.10 provides excerpts from the report of the school's 2004 Gatehouse survey analysis compared with that of 2001, and compares these results with the aggregated results obtained from the responses of several thousand Year 8 students across Australia.

Noteworthy in Table 6.10 are the improved sense of enjoyment of school reported by students, their efforts to do their best, the tightening of school procedures around partial truanting, and the improved relationships with their teachers, compared with 2001 results. Of particular interest is the apparent increase in resilience and students' acceptance of each others' differences, inferred by the fact that only 18 per cent of students reported being worried about popularity.

	<b>Questions about school Overall 'yes' responses</b>	LN 2001	Gatehouse average 2001	LN 2004
1	I like school	80%	69%	89%
2	I like my teachers	79%	66%	88%
3	I try hard in school	92%	93%	99%
4	Most days I look forward to going to school	60%	54%	81%
5	I feel good when I work hard in class	92%	86%	97%
6	My teachers notice when I am doing a good job and let me know about it	55%	71%	71%
7	My teachers are fair in dealing with students	64%	61%	87%
8	When I have an assignment to do I keep working on it until it is finished	82%	72%	86%
9	I like my classes	81%	78%	95%
10	I like the other students in my classes	90%	91%	93%
11	I help out other students who need it	92%	83%	96%
12	I worry about not being good at the things that make you popular at this school	38%	45%	18%
13	I feel safe at my school	94%	84%	95%
14	It's easy to wag (truant)	16%	41%	5%

**Table 6.10 Excerpt from the overview of the Gatehouse project survey analysis 2004**

### **The extent to which the LNSGM met the needs of 21<sup>st</sup> century girls**

The school aimed to address the specific needs of girls, identified as the need for a strong supportive network of relationships; the nurturing of a sense of individual identity and opportunities to exercise influence; and the development of emotional intelligence skills. The LNSGM, in keeping with the literature about the needs of girls (see Chapter 3), provided a sense of connectedness and inclusion such that every student would be known and cared for/ about. This security enabled better learning (Deak, 2002; 2003; Senge et al., 2000), and was augmented by relational approaches to pedagogy in academic classes (Sadker & Sadker, 1994). Pipher (1996, p.247) explains:

The ideal community would somehow be able to combine the sense of belonging that small towns offer with the freedom to be oneself that small towns sometimes inhibit. Utopia for teenage girls would be a place where they are safe and free, able to grow and develop in an atmosphere of tolerance and diversity and protected by adults who have their best interests at heart.

The sense of self, fragile in adolescent girls, was enhanced in several ways, through:

1. encouragement and opportunities to participate in a broad range of extra-curricular and cultural activities. In Year 7 this included a 'co-curricular grab' time, during which

students sampled a range of sports, music, debating and Future Problem Solving, before signing up for a team or activity. Such extracurricular involvement enabled students to 'try out' different 'selves' and test reactions and relationships in a variety of arenas, as well as developing skills of which they could be proud. Opportunities for leadership – for all students – both within and beyond the classroom, including Year 7 being tour guides on the school's Open Day, brought a sense of being trusted, and opportunities for affirmation and respect;

2. incorporating opportunities for social service such as membership of environmental groups, community service and social justice awareness-raising, and activities incorporated into the curriculum and general life of the school. 'Community problem-solving', part of the Future Problem-Solving program, was part of Year 7 Integrated Learning time;
3. adults being aware of the language they used with girls. Unconsciously, many adults use demeaning language with girls, although this is often intended affectionately (Sadker & Sadker, 1994, p.176, 195). Ongoing professional development (for example, J200105-12; J200203-04; J200403; J200410; J200411) assisted staff to be sensitive to these issues;
4. the encouragement of girls to recognise and appropriately manage negative emotions such as anger or envy – to move 'beyond nice' (L. M. Degenhardt, 2003; Sadker & Sadker, 1994; Simmons, 2002). Student-advisor relationships and conversations were successful in addressing many such issues, and many students referred in their student-advisor conversations to their growing ability to manage conflict situations;
5. assisting young women to develop the critical faculties necessary to make informed judgements about media portrayals of women. An example was the critical analysis, as part of a holistic task within Integrated Learning time, of popular magazines aimed at teenage girls. Information literacy was built into the skills developed within Integrated Learning programs and transferred to other academic subjects. This was reported by several teachers (J200403; J200407);
6. providing clear, constructive feedback so that girls could learn from mistakes (Hayes & Flannery, 2000; Sadker & Sadker, 1994; Shakeshaft, Nowell, & Perry, 2000);
7. providing strong women role models such as Mary Ward, and women in scripture, but also notable women within and beyond Australia such as Aung San Suu Kyi; and Clare Martin, Chief Minister of the Northern Territory, an ex-student of the school, whose political platform was based on social justice, particularly for Aboriginal people; and
8. nurturing a rich spiritual life in young women. This was seen as a core part of a Catholic school, and a core part of a 'fully alive human being', as discussed earlier in this chapter. Secular literature also supports the place of a spiritual life for the well-being of young people, especially girls. For example, McGillion (2003), citing the findings of the September 2003 report of the US Commission on Children at Risk's

study *Hard-wired to Connect: The New Scientific Case for Authoritative Communities*, refers to the health benefits of 'personal devotion'. Further, as Pipher (1996, p.71-2) claims:

This is a time when girls actively search for meaning and order in the universe. Often this is a time of religious crisis and of exploring universal questions such as what happens after death and the purpose of suffering. Some become very religious, others have a crisis of faith. This is a time of great idealism.

Through regular prayer and reflection activities, and particularly through the student-advisor conversations, students demonstrated a level of comfort and confidence in the life of the spirit, and developed a language for this area of their lives.

## **Evidence from areas beyond the school**

The school's recognition by external bodies, and the increasing interest by educators within and beyond Australia, including the adoption of many elements of the LNSGM by a beginning school in regional New South Wales, provided further evidence that the new paradigm was successful.

### **Recognition by external bodies**

The New South Wales Board of Studies is the body responsible for registering all non-government schools in the state. Loreto Normanhurst was scheduled for registration in 2004. The fact that, after a thorough inspection of documentation and of the site, registration was granted for the maximum possible time (J200407; J200408) was significant, and so was the ongoing interest of the most senior members of the Board of Studies, demonstrated at meetings each year and through their attendance at the official opening of buildings associated with the LNSGM (J200207-09; J200307; J200402; J200403; J200407). Further, in 2004, the school was named as one of the top ten innovative schools in Australia by *The Australian* newspaper (Buckingham, 2004), and in early 2006 received a prestigious National Award for Quality Schooling (see Chapter 7).

### **Interest by educators outside the school**

One of the areas the school had identified in 2001 as part of the strategy was the need to contribute to leadership of the education community. From this flowed a willingness to be involved in educational discourse through contribution to the literature on educational change, through presentations at conferences and through welcoming visitors to the school. Several papers were published by Loreto Normanhurst staff members (for example, L. M. Degenhardt, 2004; L. M. Degenhardt, 2005; Groundwater-Smith & Mockler, 2002; Schutz, 2004) and many professional conference and workshop presentations were delivered by a range of staff.

Further, the number of visitors to the school increased both in volume and in the distance from which these visitors came. Welcoming visitors from local areas and from interstate became routine, and visitors also occasionally came from overseas. In fact, at the end of 2004, plans were announced for the establishment in a nearby diocese of a new Catholic high school in which many elements of the LNSGM were to be incorporated. The foundation principal had been in close contact with Loreto Normanhurst prior to her appointment. She, and other visitors, were keen to observe how the holistic approach to education was working in practice and how the LNSGM incorporated contemporary learning theory.

### ***Were Mary Ward's values retained in the LNSGM?***

The school's values and tradition were important to, and inspired, all sectors of the school community, as revealed in the school's annual surveys: parents (Hunter & Jimenez, 2000; Mockler, 2003; 2004a); students (Mockler, 2002; 2003; 2004a; 2005b); and staff (Mockler, 2004a) (ChP11).

The school's aim was to educate the whole child, as a whole person, 'in and out of the classroom' (Louis & Miles, 1990, p.25) and as part of a whole community and society (Forbes, 2003). As previously discussed, education in the Mary Ward, and Catholic, tradition has always been holistic, in that it has aimed to form the whole person (Honner, 1998; Wright, 2003) (See also Appendix 4). Loreto/IBVM education has also always been innovative (Wright, 1981). As discussed in Chapter 2, Mary Ward was called, albeit pejoratively, a 'dangerous innovator' (Cameron, 2000), and Gonzaga Barry

also possessed a creative curiosity about all educational innovations whether at home or abroad, and showed considerable flexibility and willingness to experiment, although she clearly matched such visions against her vision of the purpose of the whole educational enterprise (Wright, 1981, p.36).

In developing the Loreto Normanhurst Student Growth Model, which was holistic, and innovative in responding to the needs of the times, the school was living out its Mary Ward and Catholic values. This was noted by many within the school community, for example:

It is a definite, conscious decision to look at changes in society, education, technology etc. and how they will impact on young people, and then try to provide an education which will meet these demands. Mary Ward looked at her world and developed an education to meet the needs of the time. (T41)

[The Loreto Normanhurst Student Growth Model] will necessarily make students reflect on process and other things...There is now a space for such reflection in [student-advisor conversations]. (HoD/HC13)

Mary Ward believed in providing equal education...[W]e should consider the need for equality in educating the academic, the physical, and the spiritual

etc. This strategy focuses on the holistic approach to educating the whole person. (T34)

[T]he individual learning programmes and the way we approach this I see absolutely within the centre of what we call Mary Ward values...namely the holistic development of young women. (IF07)

We have taken an educational challenge and gone into the unknown. We have taken a leap of faith as Mary Ward did before. (HoD/HC14).

Through the emphasis on a broad, liberal education, incorporating warm, caring relationships and academic rigour, the Catholic worldview and the educational philosophies of Mary Ward, Teresa Ball, and Gonzaga Barry were made manifest in the Loreto Normanhurst Student Growth Model. Mary Ward's values (Honner, 1998) were prominently placed on large banners within the Deirdre Rofe Centre (and later the Teresa Ball Centre, described below), and were constantly referred to in professional discourse, in teaching/learning situations and in student-advisor conversations, where students were asked to reflect on their manifestation and application in their daily lives. Staff took comfort in having visionary educators within the Catholic and Mary Ward tradition.

Life is constantly changing and I think one of the greatest skills we can have is the ability to live with uncertainty and respond positively when faced with challenges. Jesus did this, as did Mary Ward – it is the most important gift we can give our students. (S70)

'The person of Jesus is at the heart of a Loreto school and Gospel values permeate the entire school experience' (Wright, 2003, p.1) and was core to Mary Ward's life and her mission (Orchard, 1985). Some ways in which 'the primacy of a practical and solid faith permeating every aspect of life' (Wright, 1981, p.35) were lived out were the regular inclusion of opportunities for prayer, in a range of situations, including a daily gong which sounded at noon to mark the start of one minute's silent prayerful reflection throughout the school, an updated version of the traditional 'Angelus', and somewhat similar to the structures implemented by St Ignatius to remind the community to pray (Coleman, 2001, p.170). Advisors modelled respect for this time and trained the students to use it appropriately. Student reflections showed appreciation of this time of prayer.

The Catholic view of education is premised on the belief that parents are the first educators of their children (Sacred Congregation for Catholic Education, 1977). Parent involvement in the school increased as a result of the Loreto Normanhurst Student Growth Model: in processes of data collection and consultation, in the progressive development of the new paradigm, in information sessions and discussions, and as more active participants in their daughters' learning. The twice-yearly plenary meetings resulted in parents being significantly more involved in their daughter's learning processes and becoming more

informed about new approaches to education. For students, this reinforced their security, in that their parents and teachers were acting in concert for their welfare and growth. Parent involvement also added to students' sense of achievement, since plenary meetings were an opportunity for the adults to reinforce the gains made academically and personally over the previous half-year, to support the students' through the challenges they acknowledged, and to encourage the setting of goals for the next six months.

It was not only students who benefited from this increased parental involvement. Parents expressed satisfaction with the fact that they knew whom to contact about their daughter, whereas in their previous experience of high school, at Loreto Normanhurst and elsewhere, this had often been more difficult to navigate. Similarly, teachers expressed satisfaction in their growing confidence in interacting with parents, and increasing relationship skills in dealing with adults (J200411; J200412).

## ***Epilogue***

Data for this study were collected mainly between 2001 and 2004. However, during the time of final analysis and writing in 2005, further developments in the LNSGM occurred. These are discussed briefly.

### **Further development of the Model and structures to support it**

1. Curriculum development continued. In 2005, Years 7 and 8 were being educated within the LNSGM, and significant planning for Stage 5 (Years 9 and 10) was completed. The theme for Year 9 is Outreach, and involves a two-week trip to Far North Queensland. This was incorporated into a syllabus for Integrated Learning in Years 9 and 10, which was submitted to and subsequently endorsed by the Board of Studies. Thus students will have official recognition of this learning on their School Certificate credential. By 2006, students from Years 7 to 10 will be learning within the new Model;
2. Changes were also required in staff structures to support this expansion. The school's 2004 evaluation of the first year of implementation of the LNSGM identified that staff structures were not supporting the holistic approach sufficiently well. Many groups needed to be integrated: faculties, Year Teams, HoDs, HCs and the Leadership Team. After a long process of consultation it was decided to change organisational structures by creating an overarching FACE committee and Stage Holistic Program Committees in order to both facilitate staff interaction and to ensure that the whole school, not just Year Teams, was operating in accordance with the holistic LNSGM (see Appendix 6.4). This exemplifies the 'reculturing

leading to restructuring' approach to school change (Fullan, 1998a; Sergiovanni, 1996), discussed in Chapter 3;

3. By the end of June a new learning space, the Teresa Ball Centre, was opened. This new facility offered another flexible learning area to support the new paradigm of learning. It was the 'home' of Year 8 students in particular; but could be used by all Year groups;
4. To raise the funds for this building, and other anticipated developments, the school was engaged in a Capital Fundraising Appeal during 2005. This involved inviting every parent in the school to a dinner at which the principal/researcher spoke about the LNSGM. While not every parent attended a dinner, a critical mass of parents of current students heard the message of the new paradigm in an intimate and enjoyable context, thus increasing the overall awareness within the school community.

### **Further evidence from 2005**

There was much additional evidence in 2005 of community acceptance of the new paradigm:

1. In March, the initial focus group of parents of students in Year 7 2004 reconvened, as agreed the year before, to discuss their perceptions of the Model with the principal/researcher. While some details for improvement were suggested, the overall perceptions of these parents were positive;
2. Anecdotal evidence of parent satisfaction continued throughout the year, from a variety of sources and informants. For example, at a parent lunch in June, visitors from outside the school described the way the school's climate was perceived outside the school, as 'a school where it's "cool to learn, and cool to do the right thing"'. A small but steady stream of new students was enrolled from other schools;
3. Enrolment interviews for places in Year 7 2007 revealed a high proportion of parents who cited the LNSGM as their reason for seeking to enrol their daughter in the school, explaining their satisfaction with the school's progressive attempts to meet the needs of girls in the 21<sup>st</sup> century;
4. In July 2005, on behalf of the principal/researcher, her personal assistant telephoned most parents of Year 7 2005 students to ascertain their experience of the Model. The feedback from this exercise indicated high levels of parent satisfaction with their daughters' learning within the new Model;
5. The Pastoral Care dimension of the school was reviewed in 2005, using a variety of research methods involving students, parents and staff. The report of this review process referred to 'enormous affirmation of the Pastoral Care Dimension of Loreto

Normanhurst from students, parents and staff alike' and 'the overwhelming support of the stakeholders' (Mockler, 2005a, p.2). Such positive views demonstrate that the climate of the school continued to focus on relationships and learning as core to a school in the Mary Ward tradition;

6. In order to create some basis for tracking students' spiritual and values development, particularly longitudinally, towards the end of 2005, the school used the Australian Council of Educational Research (ACER) to administer its 'Attitudes and Values' survey instrument with all Year 8 students and analyse the results. The instrument addresses several dimensions: Conscience, Compassion, Emotional Growth, Social Growth, Service of Others, Commitment to God, and Commitment to Jesus. The ensuing report indicated that Loreto Normanhurst Year 8 students scored significantly higher on almost all measures, by comparison with the data from several thousand other survey participants across Australia. The data also showed that approximately 47 per cent of Loreto Normanhurst Year 8 students (13-14 year olds) attended Mass every week, or almost every week, compared with a national average for 15-24 year olds of just 8 per cent (Fitzgerald, 2006). The comparative results on items related to religious faith were relatively strong. For example, the average percentage agreement with items related to commitment to God was 72 (compared with 49.3 for female students across all schools); and the average percentage agreement on items related to commitment to Jesus was 62.4 (compared with 39.7 for female students across all schools). The school's intention is to administer this instrument with all students in Year 8, Year 12, and ex-students five years and ten years after leaving school in order to help discern patterns in the impact of the LNSGM on holistic growth.
7. At the end of 2005, the second annual evaluation of the LNSGM was conducted, with a similar methodology to that used in the 2004 evaluation. Among the conclusions of the draft report of the 2005 evaluation is the following:

The evidence gathered from all three stakeholder groups [students, parents, staff] suggests that in 2005, the links between different aspects of the Model were drawn more readily by students, who are by many accounts becoming more able to reflect on all four of the FACE elements, see the links between them and apply the skills and knowledge learned in one context into another (Mockler et al., 2005, p.20).

On the other hand, some data from within the school in 2005 provided evidence that there was still further work ahead, and this was to be expected in a 'continually reinventing' approach.

1. While the draft report of the 2005 evaluation of the Loreto Normanhurst Student Growth Model, referred to above, provided some positive conclusions regarding student growth, it also noted that 'some of the issues and concerns raised in the 2004 evaluation study are still present within the community in some measure' (Mockler et al., 2005, p.5). In particular, this comment seemed to refer to the need for *all* teachers and parents to understand that the FACE curriculum within the Loreto Normanhurst Student Growth Model impacted on *every* aspect of school life, not just on the Integrated Learning program.

Other concerns identified through this evaluation process were, first, the perceived heavy workload on Year 7 and 8 students resulting from the many academic subjects they had to study, as required by the New South Wales Board of Studies, as well as the work associated with Integrated Learning tasks, student-advisor conversations and plenary meetings with parents. Second, the reduction of teaching-learning time for traditional academic disciplines, required in order to make time for Integrated Learning programs, resulted in more pressure on teaching and learning in these areas. A further by-product of this was the increased number of students and classes which many teachers of traditional academic disciplines were teaching, which required them to relate with a greater number of students overall. Further discussion of this evaluation occurs in Chapter 7;

2. A further Gatehouse survey was conducted with Year 8 2005 students. The results of this were less positive than those of 2004, particularly around issues of bullying. Various explanations have been put forward within the school; for example, that these students have been *too* closely connected with each other over the past two years, or that their awareness of social/anti-social behaviour has been enhanced to the degree that they are more conscious of less than ideal social interactions. Modifications have been made to groupings for 2006 in light of these data, and the results of 2006 Gatehouse surveys will also be carefully observed.

Beyond the school, the LNSGM continued to be endorsed by the wider education community in 2005.

1. The official opening of the Teresa Ball Centre was attended by the president and the general manager of the New South Wales Board of Studies. Their attendance was significant, particularly since they had both attended the official opening of the Deirdre Rofe Centre the year before. However, it was the president's remarks after conversing with Year 8 boarding students, whose academic ability spanned a wide range, that were most telling. He said he was 'inspired' by his conversations with these students, and expressed amazement that thirteen year-olds had such insights

into themselves as people, could articulate their learning so well and explain how the Model worked and impacted on their learning in all areas;

2. Invitations to present workshops were more frequent, including those issued by the Association of Independent Schools and the Association of Heads of Independent Schools; and
3. The number of individuals and groups visiting the school increased. One visitor (KI-08), an education consultant who works with schools across Australia, made the comment, 'I still maintain that Loreto is five years ahead of any school I know in educating for the 21<sup>st</sup> century' (December, 2005).

## **Conclusions**

In the case of Loreto Normanhurst, there were several factors which influenced its strategy process and led to the development of a new educational paradigm. They related to:

1. the importance of the external context;
2. the importance of the school's value system;
3. the importance of an inclusive process;
4. the recognition of barriers and challenges; and
5. the importance of processes for coping with change and personal threat.

### **The importance of the external context**

Core to understanding and evaluating the strategy and reinvention processes at Loreto Normanhurst was the context within which they took place. The radical social change characteristic of the early 21<sup>st</sup> century drove and motivated change within education. In the 19<sup>th</sup> century, the needs of the industrial revolution required a literate, numerate and compliant workforce, and gave rise to a model of education which supplied those needs. However, the needs of the 21<sup>st</sup> century knowledge society, and the incorporation of ICT into every sphere of life, require very different skills and qualities, such as flexibility, problem-solving capabilities, social and emotional competencies and the ability to be critically reflective (Beare, 2001; Corner, 2000; Mitchell & Sackney, 2000; Senge et al., 2000). The recognition of this external context gave rise to the strategy process at Loreto Normanhurst, and the outcomes which emanated from it, namely, the development of a new educational paradigm and the efforts to become a continually reinventing school.

A sense of urgency was created by providing 'disconfirming data' (Schein, 1992), since 'the great challenge of "cruising" schools is to get the staff to realise that the school has problems' (Retallick & Fink, 2002, p.96). Strategy workshops conducted with members of the school community began with a 'strategic perspective' in which global, technological

and social change was discussed. This material constituted the 'disconfirming data' (Schein, 1992) and disequilibrium necessary to motivate change, particularly since, as evidence in this chapter illustrates, Loreto Normanhurst was perceived as a successful school. The school generally received positive feedback, which confirmed the *status quo* rather than encouraging change.

Following the 2001 strategy workshops, many parent and student workshops were held, and staff professional development continued. Entries in researcher journals from 2001 to 2004 indicate that these processes led community members to understand that the traditional subject-based education which the school had provided was not reflecting well enough what was happening in the world beyond the school (Beare, 2001; Sergiovanni, 2000; Starratt, 2003). Parallels were drawn with similar paradigm shifts occurring in business communities (Garvin, 1993; Kotter, 1996; Limerick et al., 1998), and this provided points of reinforcement for parents, students and staff, all of whom had family members and friends in the workforce beyond school. Gerstner's (2002; Segal, 2005) detailing of his successful efforts to reinvent IBM, and to change the culture within the organisation, provided many useful parallels. Without the radical social change of the early 21<sup>st</sup> century, the reinvention of the school would have been neither necessary nor successful. Thus, the external context drove and motivated the strategy process and its outcomes.

Yet one factor within the school was equally significant in driving and motivating change within the school, and gave the school an advantage over most business organisations. This factor was the school's value system. Hence the vision of how schooling could be was developed from both a 'confronting of the brutal facts' (Collins, 2001b) and the inspiration and examples of Catholic and Mary Ward values and traditions.

### **The importance of the school's value system**

The school's Catholic and Mary Ward heritage provided both direction and boundaries. The Catholic emphasis on community, its sacramental approach to life, finding God in all aspects of life, its stress on the dignity of the human person and concomitant emphasis on social justice, provided certainty amid the uncertainties of the 21<sup>st</sup> century. The school's Mary Ward history was one of risk and challenge in providing education for the needs of the times, and in valuing the contribution of women (Cameron, 2000; Wright, 1981; 1997).

The school's values were therefore significant in establishing a compelling rationale and inspiration for change, a sense of urgency, and a catalyst for the 'move from maintenance to mission' (KI-30,2001), a comment by an esteemed Loreto sister. These values provided sustenance and support through the difficulties of managing and coping with the changes,

through the modelling of Jesus and Mary Ward. They also provided boundaries for the strategy processes and outcomes, such as the perceived necessity for structures and decisions based on the needs of people rather than purely pragmatic needs, an education which was broadly liberal and transformative rather than narrowly vocational, the necessity of seeing all aspects of both process and outcomes through a spiritual lens, and the adoption of inclusive processes.

### **The importance of an inclusive process**

The inclusiveness of the process was key to the success of the strategy process and development of the LNSGM. First, the values of the school, with their emphasis on the dignity of the human person and principles of subsidiarity (Catholic Church, 1994, par.1883), required that those affected should be involved in decisions which affect them. Second, as previously discussed, the literature on successful change demonstrates that change processes are more likely to be successful if stakeholders are involved because people 'own' the change. Third, the best ideas are more likely to be found if all members of the community have the opportunity to provide input. In the Loreto Normanhurst situation, the inclusiveness of the process meant that the new educational paradigm was grounded morally, politically and practically, and was therefore less easy to dismiss when difficulties arose. Further, the personal, interpersonal and organisational growth within the school community through the involvement of so many in the strategy processes and the development of the LNSGM was significant, and is discussed further in Chapter 7.

### **The recognition of barriers and challenges**

The strategy process, particularly that of developing the LNSGM, revealed several barriers and challenges:

1. Insufficient time and additional workloads put significant pressure on many people. Running the school of the present while also planning the school of the future was like changing a tyre on a speeding car. Staff who volunteered for committees and task forces, or who developed draft plans and models, were pressed for time. Members of the Leadership Team were constantly under pressure to do their normal jobs, to develop the details of the Model, to plan the change process details, to keep people informed, and to support community members, particularly staff, who found it difficult to cope with the changes;
2. It was difficult for many staff, and some parents, to let go of entrenched comfort zones, especially since the school was already successful. The strategy process, and the radical new pedagogy to which it gave rise, meant that teaching and

learning became public rather than private activities, and comfort zones no longer existed;

3. Fear of failure was also a challenge to be met. This fear was encountered on many levels within the staff. Some feared that they would be found wanting in the new Model and that their jobs would therefore be at risk. Parents were afraid that their daughters, whether part of the old or the new paradigm, would be adversely affected by the changes in the school. Members of the Strategy Core Team constantly worried at how to turn the dreams of the community into a workable system. The principal/researcher felt an abiding sense of responsibility for the direction and well-being of the school community;
4. The envy of those not involved was an unanticipated outcome. Some students in Years older than Year 7 expressed resentment that Year 7 appeared to have better resources, both in facilities and in teachers. Once the Model was underway, however, some parents expressed regret that their older daughters would miss out on the advantages of the new paradigm. Some teachers, while not volunteering themselves, put pressure on Team members, and sometimes on Year 7 students, and unkind remarks were made at times (Mockler et al., 2004);
5. Extra financial and human resources were necessary. A small number of additional staff was employed to support the development and implementation of the Loreto Normanhurst Student Growth Model. This included the employment of casual staff to release teachers to work on cooperative planning. Without such support it would not have been possible to develop and implement such major change, as Louis and Miles (1990) argue. At the same time, the school experienced financial pressures over the years 2001 to 2004. A range of factors contributed to this, including the need to maintain the 25 acre property and the large number of buildings in both the day and boarding schools, a major increase in annual lease payments, and a large staff salary increase in 2004, common to all New South Wales' schools. Independent financial analysis indicated that the school was offering a standard of education significantly higher than its fees warranted. The school was therefore confronted with the choice of reducing its educational offerings or increasing its fee structure. In mid-2005 the School Council decided on the latter course of action; and
6. The need for patience was constantly reinforced. The way forward had to slowly evolve through the contributions of many people. Yet people within the school community wanted answers. They wanted to know what the changes would be and how they personally would be affected. Processes for coping with change were essential.

## **The importance of processes for coping with change and personal threat**

As discussed in Chapter 3, Bridges' (1995) theory of transition management offers many suggestions for supporting people through change, some of which include describing clearly for people what their role will be in major change. This approach implies that someone else has planned the change in the first place, whereas the strategy process at Loreto Normanhurst was intended to involve the members of the school community in discerning together what the educational changes needed to be. This is a more difficult and vexed issue, as there is no template for change. Some staff members referred to the anxiety that this situation caused, and consequent difficulty in the reinvention process:

Not seeing a real working model (T45);  
The blank canvas – where do you start? (T47).

While many efforts were made at Loreto Normanhurst to support people in coping with and managing change, and incorporating insights from transition management theory, there was no escaping the challenge of 'making the path by walking it' when there was no exact prototype to follow. As one staff member colourfully expressed it, 'it's like being between trapezes...there's nothing to hang onto' (J200306).

Schein's (1992) theory that major change is provoked within a culture by people being confronted with 'disconfirming data' more closely described the school's strategy process. It was a reinvention, not just an innovation or a series of changes. As one participant described it: 'Change can be incremental, whereas I believe reinvention is sometimes turning something on its head' (I102). The external facilitator played a major role in provoking this level of change, and other outside consultants helped the staff to acquire the skills necessary for such a major paradigm shift in the education offered by the school.

As discussed earlier, although staff reactions to the strategy workshops conducted by the external facilitator were initially positive, staff attitudes towards these workshops, and particularly towards the facilitator, later became more negative. The researcher/principal concluded, first, that this paradox reinforced the extent to which participants' views are influenced by context. Her second conclusion was that there were many advantages in a facilitator who came from outside the educational culture. The strategy's ultimate success was in no small part due to this facilitator's conceptual framework, the background outside educational and Catholic cultures that he brought, and the relentless pressure he applied. Other members of the Leadership Team also considered that the school would not have developed such a far-reaching strategy without this facilitator (KI-14; I101; I108; KI-11).

Perhaps predictably, his approach caused many problems within the staff. His personal style and his way of introducing 'disconfirming data' (Schein, 1992) threatened many, and this put extra pressure on the Leadership Team, who had to deal with the outcomes of this threat. Yet an external facilitator can mount challenges too dangerous for an internal change agent, causing people to examine and articulate their assumptions, and creating a level of disequilibrium (Piaget, 1972) that requires a new cognitive framework. This process is both confusing and painful, and the negative emotions it caused were undoubtedly projected onto the external facilitator, and perhaps also, to some extent, onto the principal/researcher and the Leadership Team.

The employment of a wide range of external education consultants ensured that the new cognitive frameworks could be reinforced and supported (Louis & Miles, 1990). Outside experts in curriculum design, in pedagogy, in authentic learning, in emotional intelligence, in pastoral care and in the values and traditions of the school were employed within the school. The messages they conveyed reinforced the approaches of those within the school who were supporting staff in a wide range of areas. This confirmatory experience reinforced all parties: staff were able to question external experts and be reassured, and those providing internal professional development were vindicated in what they were doing.

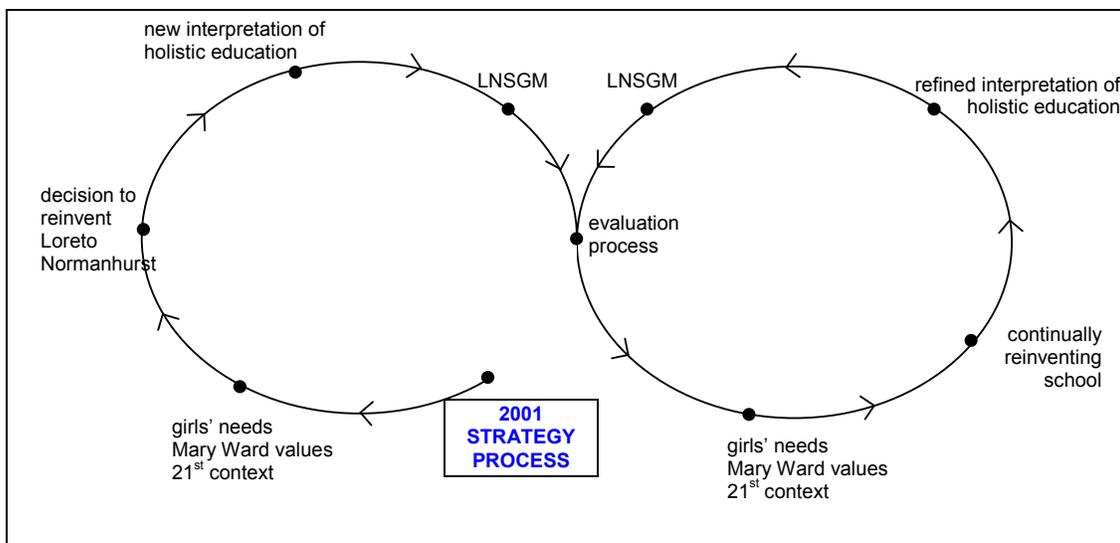
In summary, the strategy process and the process of developing of the Loreto Normanhurst Student Growth Model ensured that the new paradigm was forged from deep discernment, discussion and debate. These processes also brought about an emerging awareness that the school needed to be continually reinventing itself. It is this process of becoming a 'continually reinventing' school which is addressed in the next chapter.

## CHAPTER 7: FINDINGS - REINVENTION PROCESS AND OUTCOMES

This chapter addresses the following research sub-questions:

3. What factors assisted the reinvention process?
4. What factors hindered the reinvention process?
5. How was the reinvention process experienced by key stakeholders?
9. What were the learnings from the reinvention process?

As discussed in the previous chapter, the 2001 strategy process led to significant changes within Loreto Normanhurst, as the school determined to develop an education more relevant for 21<sup>st</sup> girls within the boundaries of its core Catholic and Mary Ward values. As Figure 7.1 illustrates, the decision taken during the strategy process to become a 'continually reinventing' school led to an ongoing cycle of transformation.



**Figure 7.1 The relationship between development of the LNSGM and becoming a continually reinventing school**

The annual evaluation process was the point at which the process became an ongoing cycle of development and reinvention, in the values-based hermeneutic process of linking the school's values to the present and future. As the school continually responded to the 21<sup>st</sup> century context and the changing needs of young women, within its constant values framework, it became a continually reinventing school, a learning community (Argyris & Schön, 1978; Hargreaves, 2003b; MacGilchrist et al., 1997; Mitchell & Sackney, 2000; Schein, 1992; Senge, 2002), as discussed in Chapter 3. The effort to become a continually reinventing school affected all the people within the school community to some degree.

## ***Participants' experience of the process***

It was expected that participants' experiences of and reactions to the reinvention process would vary widely: people's attitudes to change are well documented (Argyris, 1992a; Bridges, 1995; Gerstner, 2002; Loucks-Horsley, 1996; Schein, 1992). Table 7.1 summarises the range of experiences identified by participants among various stakeholder groups, and discussion follows. (Bracketed numbers refer to frequency of responses in the February 2004 staff survey.) For other abbreviations, see Glossary section.

	<b>Positive</b>	<b>Ambivalent</b>	<b>Negative</b>
<b>Students</b>	<ul style="list-style-type: none"> <li>- acquisition of new skills (Yr 7)</li> <li>- ability to see connections between subjects (Yr 7)</li> <li>- relationship with Advisor (Yr 7, EV05)</li> <li>- ability to articulate learning in plenary meetings (Yr 7, EV05)</li> <li>- some 'overwhelmingly positive' responses (EV03)</li> <li>- ability to organise self and work independently (IF11)</li> <li>- learning from mistakes (IF11)</li> </ul>	<ul style="list-style-type: none"> <li>- unclear of detail (IF09)</li> <li>- uncertainty re future HSC performance (IF09)</li> <li>- awareness of teacher stress, negativity (EV05)</li> <li>- students in the existing Model may be disadvantaged in job market (Yrs 8-12, IF09)</li> <li>- integrated curriculum (only 52 per cent of Yr 7 students agreed that the work done in Integrated Learning time was valuable and worthwhile.)</li> </ul>	<ul style="list-style-type: none"> <li>- feeling like second-class citizens (Yrs 8-12) (EV03)</li> <li>- resentful of resources (including 'the best teachers') directed to Year 7 (Yrs 8-12) (IF05) (EV03)</li> <li>- fear that all families would be funding benefits that only some could access (Yrs 8-12, EV03)</li> <li>- dissatisfaction of teachers missing classes to work on strategy issues (IF10)</li> <li>- pressure of work (Yr 7) (IF11)</li> <li>- feel like guinea pigs (Yr 7) (IF11)</li> <li>- missing out on 'subject' time (Yr 7, EV05)</li> <li>- difficulty in working in a large space with many others (EV05)</li> </ul>
<b>Parents</b>	<ul style="list-style-type: none"> <li>- excited that school is addressing needs of 21<sup>st</sup> century (IF04, IF05, IF06, EV08)</li> <li>- confidence because of school's past record in managing change (IF05)</li> <li>- pride and faith in the school generally (IF04)</li> <li>- confidence in and support of the school's values (IF05, IF06)</li> <li>- approval of many aspects of LNSGM e.g. development of emotional intelligence</li> </ul>	<ul style="list-style-type: none"> <li>- uncertainty re future HSC performance (IF06)</li> <li>- concern re staff attitudes (IF06) (EV05)</li> <li>- change experienced as incremental (IF05)</li> <li>- cautious optimism (IF04)</li> <li>- uncertainty (IF04)</li> </ul>	<ul style="list-style-type: none"> <li>- concerns about lack of detail re SGPs (EV08)</li> <li>- negativity and fear (IF06)</li> <li>- concern at additional pressures the LNSGM would put on families (IF05)</li> <li>- parents of Year 8-12 students concerned that their daughters would miss out on resources/'the best teachers'/the benefit of the Model</li> <li>- concern re insufficient homework for Year 7 (IF06)</li> </ul>

	<b>Positive</b>	<b>Ambivalent</b>	<b>Negative</b>
<b>Staff</b>	<ul style="list-style-type: none"> <li>- exciting, inspiring (44%) (IF01) (II04)</li> <li>- stimulating (33%)</li> <li>- positive, fulfilling, empowering (23%)</li> <li>- interesting (13%) (IF02)</li> <li>- proud, privileged (2%) (IF02)</li> <li>- valuing the opportunity to work closely with others on creative work (IF02)</li> <li>- inclusive process (II04)</li> </ul>	<ul style="list-style-type: none"> <li>- unsure, uninvolved (16%, although most of these responses were from non-teachers) (II03)</li> <li>- many responses expressed both positive and negative aspects</li> <li>- challenging (33%)(IF02)</li> </ul>	<ul style="list-style-type: none"> <li>- frustrating, confusing (13%) (IF10)</li> <li>- dislike of facilitator soured the experience (IF10, IF01)</li> <li>- stressful, difficult (12%) (IF10)</li> <li>- tiring, exhausting, extra work (11%) (IF02)</li> <li>- daunting, threatening (9%)</li> <li>- anger at Leadership Team for not providing answers (IF01)</li> <li>- political issues (II01)</li> <li>- overwhelming responsibility at times (IF02)</li> </ul>
<b>Administrators : within school</b>  (This section includes responses from the Leadership Team, and Strategy Core Team.)	<ul style="list-style-type: none"> <li>- exciting (II01, II05, II06, II07, II08)</li> <li>- a formative experience, extending (II01, II07, II08)</li> <li>- fulfilling to put long-held ideas into practice (II07, II08)</li> <li>- exhilarating (IF02)</li> <li>- privileged to be part of a dynamic school (II06, II08)</li> <li>- freeing and confirming (II07)</li> </ul>	<ul style="list-style-type: none"> <li>- challenging (II05, II06, II07, IF02)</li> </ul>	<ul style="list-style-type: none"> <li>- pressured, hard to balance demands of day-to-day job with the demands of strategic planning (II05, II07)</li> <li>- sometimes terrifying when the way forward was not clear (II08)</li> <li>- some difficult interpersonal situations to navigate, balancing following through on the vision with listening (II08)</li> </ul>
<b>Administrators: external to the daily life of the school</b>  (This section includes responses from the School Council, Loreto sisters, Strategy Team, external facilitator.)	<ul style="list-style-type: none"> <li>- fulfilling (II03)</li> <li>- exciting (IF07) (IF08)</li> <li>- interesting, interested (IF07)</li> <li>- fascinated (IF07)</li> <li>- willingness to take needed risks (IF07) (IF08)</li> <li>- thrilling (IF08)</li> <li>- honoured to be involved (IF08)</li> <li>- impressed by the number of people involved (IF08)</li> </ul>	<ul style="list-style-type: none"> <li>- challenging (IF07)</li> <li>- apprehension (IF07)</li> <li>- awareness of resistance (IF07) (IF08)</li> <li>- challenging (IF08)</li> </ul>	<ul style="list-style-type: none"> <li>- out of comfort zone (II03)</li> <li>- frustrating (IF08)</li> </ul>

(Note: 107 staff members completed the 2004 Staff Survey)

**Table 7.1 Participants' experience of the reinvention process, Term 1 2004**

## Students

### Year 7 2004 students

Year 7 2004 students experienced only the first year of implementation of the LNSGM, and obviously not the reinvention process leading up to implementation. As the only students

in the school working within the LNSGM, Year 7 students reported that they felt different, and under scrutiny by others (IF11). They were the focus of parental and teacher concern and many Year 7 students picked up this anxiety. Students in Years 8-12 also commented on this: '...because of the new system ...people are constantly asking them [Year 7s] questions so it kind of makes them feel really different.' (IF09)

The school's evaluation of the first year of implementation of the Loreto Normanhurst Student Growth Model included five focus group interviews of Year 7 2004 students and a survey of all Year 7 students. Data from these sources revealed general agreement that Integrated Learning time provided students with new skills, and 70 per cent of survey respondents agreed that the Model helped them to see connections between subjects. While a higher proportion of positive responses would have been desirable, those driving the changes saw this level of support as satisfactory in the first year of implementation of such a new paradigm. Overall, Year 7 students expressed positive support for the way in which they were learning. In particular, they referred to the acquisition of new skills, the ability to make connections between subjects, the relationship with advisors and the student-advisor conversations, and also the plenary meetings at which students demonstrated their learning to their parents and advisor (EV05). Many Year 7 students expressed relief at the prospect of the following year, when one third of the school would be operating out of the new Model.

[Year 7] students felt that being 'different' from the rest of the school had been difficult at times this year, and that students in years 8-12 and some teachers had exacerbated this by questioning them about what they were doing and at times making them feel they were part of a 'strange new system'. (EV05, p13; IF11)

### **Year 8-11 2004 students**

In the May 2002 stakeholder consultation on Student Growth Plans, forty students from Years 7-12 were involved in focus group interviews with an external interviewer. Their views were generally positive about the potential of the school's direction (Groundwater-Smith, 2002):

It was seen that the development of the [Student Growth] plans would ultimately not only encompass the school day but 'bring together the home person and the school person'...One group believed that the development of the plan showed that the school was forward-looking (p.19).

This will be an opportunity for students and teachers to learn together (p.24)

I think that it is a great idea and it will be good for the future of the school (p.25).

When asked what message they would like to give to teachers about supporting the new way of learning, students' responses reinforced the need for authentic learning approaches (Gore, 2005; Starratt, 2004b), as the external researcher's report (Groundwater-Smith, 2002, p.23-5) details:

Make sure you drop the whole 'I am the teacher therefore I know more' stuff. And try to speak to us as a friend, honestly asking our opinions. Make sure that it's a comfortable environment and be willing to have an environment where people can change.

To get the teachers to understand the students and get to know them on a more personal level, so that both teachers and students are able to be truthful, honest and respectful to each other.

Many students from Years 8-12 2004, however, perceived the reinvention as disadvantaging them, fearing that they were missing out on resourcing, attention and access to particular teachers, and perhaps even post-school opportunities. Such attitudes were revealed in the 2004 focus group interviews of students, parents, and staff, as the comments below illustrate.

A lot of people are worried that you're monitoring the Year 7s and so therefore you won't be focusing as much on the Year 12s (IF09) (students)

...when we finish school...are the Year 7s...going to get the job rather than us because they've had the new training? (IF09) (students)

...everyone in our Year I know is really sceptical about it' (IF09) (students)

The majority [of comments about the Loreto Normanhurst Student Growth Model] I've had is positive...except from the Year 10 girls who've decided that all the Year 7s are going to fail. The Year 9s aren't happy either, I can tell you, (IF04) (parents)

My daughter in Year 9's a bit jealous, saying 'why should they get the Hall made up for them and we get nothing?' (IF06) (parents)

Despite efforts to inform students from Years 8 -12 2004, to involve them in discussion about the LNSGM, and to seek their views through workshops, surveys and in assemblies, throughout 2001-2004, it was difficult to alter their negative perceptions. The most effective means of doing so seemed to be informal conversations with teachers 'we've had a few teachers who've tried to explain what it'll do in the long-term' (IF09), and the timetabling of classes in the new learning area, thus giving the opportunity of direct experience of some aspects of the LNSGM. In fact, this need for direct experience of the change was also named by other participants (IF02; IF03; KI-06).

On the other hand, the views of some students in Years 8-12 expressed a clear understanding of the potential benefits of the reinvention, and its connection to both Mary Ward values and the changing external context:

...it's a bit like Mary Ward...sticking with it, and improving women and their chance out in the workforce as independent women, but also as a person who gets along with everyone and is cooperative and has all those values. (IF09)

...you need to take a chance to progress in everything...the whole school would have changed, had drastic changes like this in the past one hundred years, which [made] it the school it is today. So without those we could still have been doing something that they were doing fifty years ago, but this is the way we learn now, we think it's the best, but they probably thought that as well. So by introducing this [Loreto Normanhurst Student Growth Model], it's kind of bringing in a new 'best' which [the school] will one day be known for this. (IF09)

## Parents

From data gathered in annual parent satisfaction surveys (EV06; EV07; EV08), a strong rationale emerged for an education relevant for the world of the 21<sup>st</sup> century, particularly in respect to non-academic aspects. Such a response was important,

and represent[ed] a clear indicator of the value-added responsibility of school education. The long term potential of experiences at school to shape future life outcomes is widely acknowledged in education research literature (e.g., Connell, Ashenden, Kessler, and Dowsett, 1982) (Hunter & Jimenez, 2000, p.24).

The 2001 parent strategy workshops generated interest and support, and also raised concerns held by parents, such as whether the new system would work, or that the principal might leave before the system was in place (J200105-12). In an effort to involve parents as fully as possible, as Hargreaves and Fullan (1998, p.96-7) recommend, all current parents were strongly encouraged to attend a workshop in 2002 at which the school's future direction was explained. Approximately 60 per cent of families were represented. Reactions of parents present varied from concern, acceptance of the need but reluctance to change, to enthusiastic support (J200207-09).

Parent members of the Strategy Team also reported back on parent perspectives, gained from responses to the letters they had sent, phone calls from other parents, and informal contact at such events as Saturday sport. Overall, they reported that parent attitudes towards the LNSGM and the reinvention of the school were very positive. One Year 7 parent had reported that her daughter was 'the happiest that she had ever been' and parent reactions to the plenary meetings at the end of Term 2 were very positive (J200407).

In focus group interviews conducted in 2004 with parents (IF04; IF06; IF05), participants referred to a range of reactions which they themselves, or other parents, had experienced in regard to the reinvention. These included:

- cautious optimism;  
I went along to the lecture ...and I read over and over again the paper that you suggested...and I thought there can't be anything wrong with this. It's got to be a positive thing. (IF04);
- positiveness and satisfaction;  
I actually approached this with a very positive frame of mind...I work in an industry which is driven by change (IF06).  
  
My second daughter would have benefited enormously from somebody ...who was a mentor to her, someone who she could develop a personal relationship with (IF04);
- negativity and fear;  
When we were walking out of the hall down there, there were a lot of people thinking this just isn't going to work. The kids aren't old enough, they're not mature enough, sort of ...looking for reasons why it wouldn't work, rather than focusing on...the longer term objectives being a benefit (IF06).

Several parents in the focus groups made frequent reference to the difficulty of coping with change;

Some people simply don't like change, and they weren't listening to what was being said (IF06).

However, they fell back on several factors to reassure themselves through the change:

- comparing with what they already knew;  
It's sort of building on a foundation I think that's here already, but going up, stepping up a level...so to me it may not be such a risky change at all (IF06);
- a history of previous successful changes;  
the biggest change that I noticed...was probably the introduction of vertical pastoral care...which they [the students] were very hesitant about initially...Now...they've said how fantastic it was (IF05).  
  
We have seen the school change, and it has been for the better (IF05);
- faith in the school;  
It has a great history...great academic results' (IF05).  
  
The record that Loreto's got...it's a very good school (IF04).  
  
Loreto...has always produced outstanding women that go on to do outstanding things in the community, in professional life, in social justice (IF05).

Parent focus group participants were happy with the level of involvement they had in the process, and with the communication from the school:

The school has given the parents every opportunity to come to terms with the changes...as parents, we had an understanding of the direction the school was going in (IF05).

Several expressed awareness that the reinvention required a change in their own role, and closer involvement in their daughter's education. While this was seen as positive, 'You're inviting each and every family to be part of the system....and I'm quite impressed' (IF05), some expressed concern at the additional pressure this would put on families (II04), '[In] today's family it's quite often that they'll be coming home to neither mum nor dad, who are both still at work...the whole family structure has changed' (IF05). The busyness of parents inhibiting involvement with the school was also referred to by students in the 2002 community review of progress towards Student Growth Plans (Groundwater-Smith, 2002).

Several parents perceived the need for schooling to change in the context of a changing world, however: 'The environment that we're sending our girls into has changed dramatically and is changing quite dramatically...you have to teach them to acquire new knowledge...the process of acquiring knowledge' (IF05). At the same time, they placed great store on the school's values and charism and saw these as remaining constant: 'the underlying values of the school will always be there' (IF06).

Parent focus group participants with daughters in Year 7 2004 expressed approval of many aspects of the new model, particularly the development of emotional intelligence, the emphasis on learning how to learn, and the student-advisor conversations (IF06). In an attempt to 'move toward the danger in forming new alliances' (Hargreaves & Fullan, 1998, p.113), the principal/researcher continued to invite parents who had concerns to speak with her individually, and often these parents became the strongest advocates of the new LNSGM (J200403). Further, the mid-year plenary meetings with advisors reinforced the faith of many parents of Year 7 students, as so many reported to other staff and to the principal/researcher (J200406). These parents were impressed by what their daughters had achieved in a number of areas, including their ability to articulate their learning and their goals (IF06).

The report of the school's 2004 evaluation of the first year of implementation of the Loreto Normanhurst Student Growth Model concluded:

On the whole parents are supportive of the Model, in particular the skills that their daughters are developing. They see these skills both as short term benefits (the HSC) and long term life skills. Parents want the Model to work and see the value in the aspects of the Model that support the student as individual. (Mockler et al., 2004, p.17)

Significantly, no parents removed their daughter from the school in 2004 as a result of the Model. What was noteworthy was the gradual shift in parent attitudes and their growing confidence with the changes. The school's ongoing attempts to involve parents and support them through the changes was, in itself, part of the culture of the 'constantly reinventing' school. Staff also needed to be supported through the changes.

## Staff

As discussed in Chapter 6, the analysis of data collected from staff at the end of 2000 revealed staff awareness of the need for the school to adapt to a changing environment, as well as foreshadowing reluctance to change (as did the data in the 1996 review of the school, discussed in Chapter 2). This dichotomy of attitudes within staff prevailed for several years, and was revealed in workshops, surveys, and in daily life within the school. Staff are critical players in school change. Whether the change is externally imposed, or comes from within the school, it is the staff who implement (or fail to implement) change. In the case of Loreto Normanhurst, staff were key players in also determining what that change would be. Hence, the section on how staff experienced the reinvention is expanded by comparison with other stakeholder groups.

In August 2001, shortly after the school's new direction had been decided, in an attempt to acknowledge and address affective responses, as recommended in the literature (Fullan, 1997a; Mitchell & Sackney, 2000; Starratt, 1993), teaching staff were asked to choose a postcard which in some way represented how they felt about the new strategy and to explain their feelings on the back of the postcard. The (anonymous) responses were loosely grouped into categories, and some verbatim comments illustrate each category. Table 7.2 provides a summary.

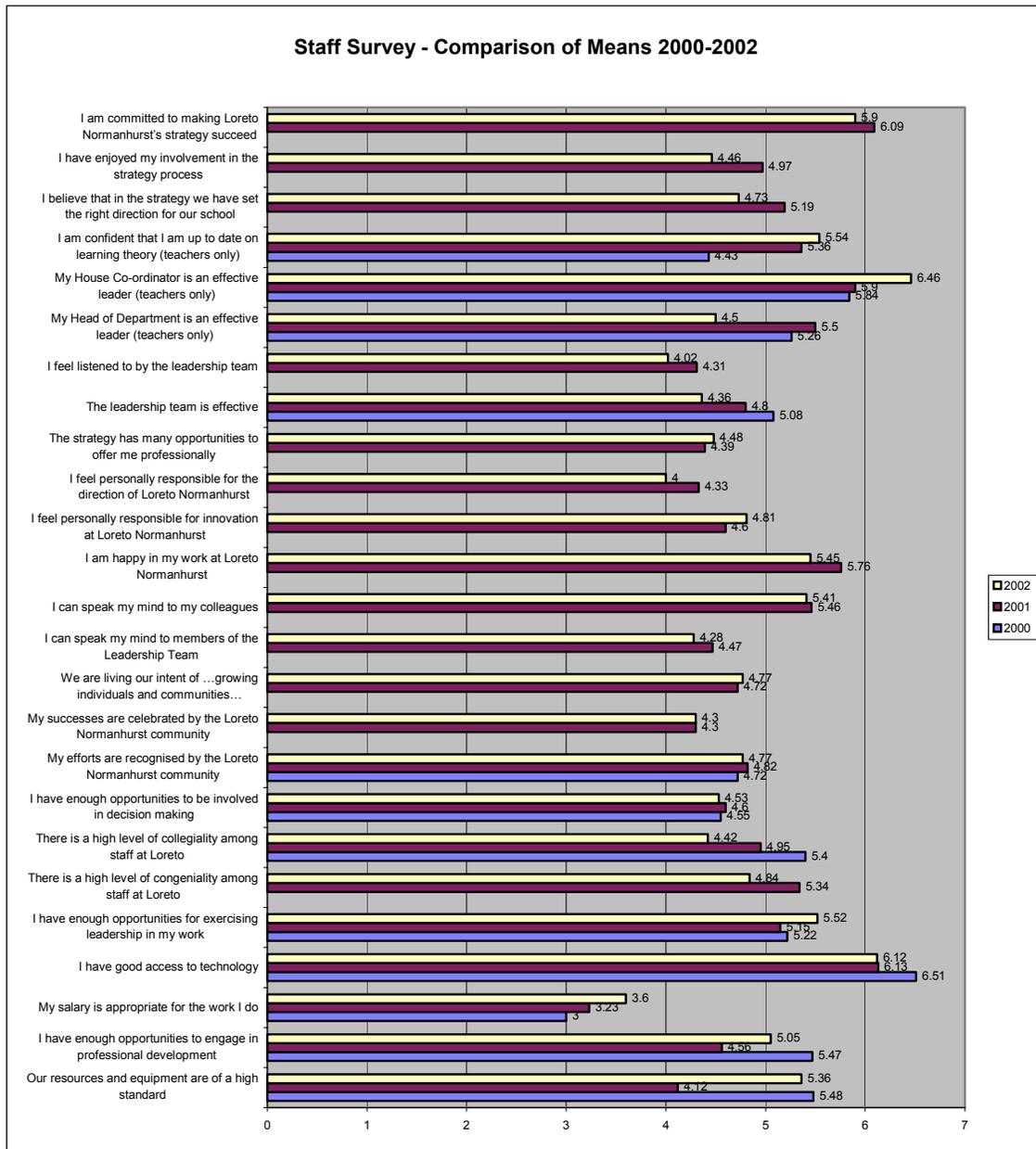
<p><b>Passion, Excitement and Opportunities</b></p>
<p>For our school and ourselves:</p> <ul style="list-style-type: none"> <li>• <i>Thank you for giving us the opportunity to jump. Can't wait to put it into practice.</i></li> <li>• <i>This is a chance to bring our dreams about what may be or could be into a reality of what is.</i></li> <li>• <i>This strategy has the potential to free us from what is still essentially as C19th model of education</i></li> <li>• <i>Strategy will lead us forward to fulfill Mary Ward's vision.</i></li> </ul>
<p>For our students...</p> <ul style="list-style-type: none"> <li>• <i>This card reminds me of what is important – our students. We want to prepare them as much as possible for the future.</i></li> <li>• <i>Free at last, as a student to explore own interests, have a substantial input into own learning program, put meaning into school learning.</i></li> <li>• <i>It's all about empowering the student by educating the heart. (Not a solely academic agenda)</i></li> </ul>
<p><b>Fear, Trepidation and Reservations</b></p>
<p>Of the unknown...</p> <ul style="list-style-type: none"> <li>• <i>Just when I thought I had it all solved, another challenge presents itself.</i></li> <li>• <i>I'm not sure what's going on and where it's all leading and to that extent this leads to 'knots' in the tummy.</i></li> </ul>
<p>Of technology...</p> <ul style="list-style-type: none"> <li>• <i>As we increase the importance of IT in the school I fear that we will be paving the way for intimate relationships with computers but less time for interpersonal relationships</i></li> </ul>
<p>For our people...</p> <ul style="list-style-type: none"> <li>• <i>I appreciate the need to make change to make our place better. At the same time there is a need to tread lightly to allow for the difficulties that people will face and perhaps are facing.</i></li> </ul>

About it working this time...

- *The desire for change has been recycled over and over again.*
- *Changes are great but we've had too many in too short a time. I want out!*

**Table 7.2 Teachers' affective responses to the Loreto Normanhurst Strategy, August 2001**

Further data were gathered from staff surveys conducted in 2000, 2001 and 2002, which revealed staff attitudes on key aspects related to the reinvention process. As Table 7.3 illustrates, the results revealed some loss of staff confidence as the strategy process moved from the decision on the direction of the school to the implementation of that decision.



**Table 7.3 Staff views of the school's strategy, comparative results 2000-2002**  
(Figures indicate the mean responses on a 7-point Likert scale.)

Such a reaction is congruent with the uncertainty and grieving which is part of the transition process (Bridges, 1995), and also with the Stages of Concern of the Concerns-Based Adoption Model (CBAM), discussed later in this section.

The comparative analysis of staff attitudes also revealed the increasing confidence of teachers in their knowledge of contemporary learning theory, and high levels of satisfaction with professional development opportunities. Congruent with the literature, which notes that major change is accompanied by conflict (Little, 1995; Marzano et al., 2005; Schein, 1992), lower levels of collegiality and congeniality were reported by teachers as the changes proceeded. Declining levels of satisfaction with the Leadership Team were also apparent, and this issue is discussed in Chapter 8. On the other hand, while showing decreasing levels of responsibility for the direction of the school once the strategy had been determined, teachers reported increasing levels of personal responsibility for innovation and leadership. Such professional capacity-building was a major aspect of the reinvention process.

Staff responses to the survey at the start of 2004 revealed a range of reactions in response to the questions 'How have you experienced the reinvention process? What has it been like to be part of a reinventing school?' While some staff described a range of reactions, there were no completely negative comments made in response to this question:

The process has been challenging, stressful, confronting. There have been uncertainties but also with all these difficulties a sense of excitement and anticipation in embracing a new concept and challenge. (HoD/HC14);

I am excited about being part of a reinventing school but concerned about the things that continue to hold this process back e.g. some people appear to be interested in change yet desperately hold on to what has always been done. (T28)

The majority of open-ended responses were positive, as illustrated in Tables 7.1, 7.5 and 7.6 and by the following sample comments:

[It has been] enlivening – I have enjoyed the sense of possibility – the journey into being honest about who we are and can be. [I appreciate] the courage in allowing formation to happen. (HoD/HC5);

I enjoy being part of the reinvention process. It compels you to review practices, reassess skills, search for information, build and extend knowledge. It is team building and forges new relationships within a community. (T59);

I accept with my opened arms...it would be great for our girls. (T57);

[My experience has been one of] challenge personally and professionally – [it is] great that reinvention is recognised as it is a continual ongoing process. (S83).

Some four weeks after this survey was conducted, however, the first ‘implementation dip’ (Fullan, 2001) occurred. Members of the inaugural Year 7 Team, in particular, were experiencing high levels of stress. From individual meetings with each member (J200402), the principal/researcher was informed that Team members considered that they were not being given adequate support from the Leadership Team and also that they believed that they were not being given the authority to make decisions they considered necessary. Several members of the Year 7 Team expressed concern about the students in their care, about their workload and for their professional reputations.

Coincidentally, it was at this time that the external interviewer conducted four focus group interviews of self-nominating staff (see Chapter 4 for details.) Data from these interviews were generally quite negative – even from focus groups which had been intimately connected with the reinvention process (IF01; IF02; IF03; IF10). Often there were internal inconsistencies in the transcripts of focus group interviews, particularly about the simultaneous desire for and fear of inclusion, autonomy and responsibility for running the new Model. The prevailing emotions appeared to be fear and anger:

[T]here’s a fear that I can’t afford to not be seen to be completely compliant.  
 (IF10)  
 ...[W]e were very excited, but that’s when we realised what a big job we had to do. (IF01)

The Concerns-Based Adoption Model (CBAM) (Hord, Rutherford, Huling-Austin, & Hall, 1987; Loucks-Horsley, 1996), summarised in Table 7.4 provides a framework for understanding this range of reactions to the reinvention process expressed by teachers.

IMPACT	6 Refocusing	I have some ideas about something that would work even better.
	5 Collaboration	I am concerned about relating what I am doing with what other instructors are doing.
	4 Consequence	How is my use affecting kids?
TASK	3 Management	I seem to be spending all my time getting materials ready.
SELF	2 Personal	How will using it affect me?
	1 Informational	I would like to know more about it.
	0 Awareness	I am not concerned about it (the innovation).

**Table 7.4 Stages of Concern: typical expressions of concern about an innovation**  
 (from Hord (1987, p.31))

CBAM identifies seven stages of concern experienced by teachers as they cope with change and innovation. The CBAM model acknowledges that learning brings change and that people evolve both in the kinds of questions they ask and in their use of an innovation.

Teachers at Loreto Normanhurst were spread across all seven stages, from excited innovators, and ‘continual reinventers’, at Level 6 to those at Level 0, who hoped it would all go away or wanted to ‘sit on the fence’, watching and waiting. In 2004, all staff were asked how they had experienced the reinvention. Their open-ended responses were subsequently grouped into categories by the principal/researcher. Several conclusions can be drawn from this analysis, presented in Table 7.5. First, the number of positive responses, on the left side of the table, are greater in number than negative responses. Second, only a small percentage of teacher respondents were uninvolved or unsure of their opinion, indicating few teachers operating from CBAM Level 0. Third, many participants identified a range of feelings. Given the extent of the paradigm shift, this was to be expected.

	Number of respondents	exciting, inspiring	challenging, demanding, stimulating	positive, rewarding, fulfilling	proud, privileged	interesting, interested	daunting, threatening, overwhelming	stressful, difficult, anxious	tiring, exhausting, extra work	frustrating, confusing	unsure, uninvolved
Leadership Team	6	67%	83%	33%	0	0	33%	33%	50%	50%	0
Middle managers	16	44%	37%	25%	0	6%	6%	31%	25%	12%	6%
Teachers	41	52%	24%	29%	2%	10%	10%	7%	2%	14%	10%
Support Staff	24	25%	33%	12%	4%	17%	4%	4%	8%	4%	25%
Boarding Staff	9	11%	11%	0	0	33%	0	0	0	0	44%
<b>Total</b>	<b>97</b>	<b>41%</b>	<b>31%</b>	<b>22%</b>	<b>2%</b>	<b>12%</b>	<b>8%</b>	<b>11%</b>	<b>10%</b>	<b>12%</b>	<b>15%</b>

**Table 7.5 Staff responses to the question ‘How have YOU experienced the reinvention? January 2004**

All staff were also asked for their opinion on how other people had been affected by the reinvention. The analysis of these data is presented in Table 7.6.

	Number of respondent	positive	negative, resistant	mixture of positive and negative	fear, apprehension, threat, anxiety	analytical re impact of change on people	stressed, confused, over-whelmed	felt not consulted	in denial	became more positive over time	negative towards facilitator
Leadership Team	6	67%	17%	50%	50%	0	33%	0	17%	50%	17%
Middle Managers	16	37%	31%	50%	25%	6%	25%	12%	19%	19%	6%
Teachers	41	17% (10% most)	10%	19%	24%	10%	19% (2% most)	0	5%	2%	0
Support staff	24	17% (7% - most)	7%	25%	22% (2% most)	10%	10%	0	0	0	0
Boarding Staff	9	0	0	0	22%	11%	11%	0	0	0	0
<b>Total</b>	<b>96</b>	<b>25%</b> (17% most)	<b>14%</b>	<b>25%</b>	<b>29%</b> (1% most)	<b>10%</b>	<b>20%</b> (1% most)	<b>2%</b>	<b>6%</b>	<b>7%</b>	<b>2%</b>

**Table 7.6 Responses to 2004 staff survey question ‘Do you have a feel for how the reinvention process affected other people?’ January 2004**

Some interesting conclusions can be drawn, particularly from the comparison of answers to the two questions. Overall, responses were grouped into three major categories: positive feelings, negative feelings, or a mixture of both. For example, 17 per cent of teachers responding to this question believed that staff felt positive about the reinvention process, and ten per cent of these believed that most staff felt that way. On balance, the belief of respondents was that other people had been affected in more positive than negative ways, but a high proportion believed that others were affected both positively and negatively.

Half the respondents referred to the fear experienced by some teachers, and this fear was reported to take a range of forms: fear of lack of competence, or being perceived as incompetent; fear of losing one's job; fear of change, or fear of the unknown, particularly as there was no 'prototype' for the change. These reactions were also raised in a staff focus group (IF03) and can be understood as CBAM Level 2. Several respondents expressed frustration with colleagues whom they viewed as resistant to change, when they themselves were excited about what the reinvention promised for students and for learning (CBAM Levels 4 and 5) and this issue is addressed later in this chapter as one of the factors which hindered the reinvention.

The reinvention process generated strong opinions among staff. The passionate expression used by participants in focus group interviews to describe their reactions indicated a strong level of commitment to the school and to the reinvention, as well as frustration at the amount of time the new paradigm required of them (CBAM Level 3). Negative views expressed in the data for this study were seen as potentially beneficial to the reinvention process, assisting in the identification and addressing of problems (CBAM Level 6), thus providing a further example of how this research impacted on the reinvention. Such views could be seen as an indication of staff commitment: people cared passionately about the students, the school and their profession.

Staff reactions could also be interpreted through other frames. Bridges' (1995) theory of transition management refers to the need for people to be able to visualise how change will affect them. 'At times it has been frustrating - until towards the end of 2003 I found it hard to visualise how a Year 7 2004 student's day would look.' (T66) Others found it a challenge that everything was changing at once, and there was no template to follow (T45; S73).

Ageing can also explain the reactions of some staff (Mulford & Silins, 2003). Huberman's (1988) research (cited in Fullan & Hargreaves, 1998; and Lieberman & Miller, 2004) found that 'most teachers in mid-to-late career were unlikely to embrace innovation with enthusiasm, and unlikely to make any radical changes in their approaches to

instruction...and some...were deeply cynical about change' (Fullan & Hargreaves, 1998, p.27). However, the Loreto Normanhurst experience reinforced Fullan and Hargreaves' (1998) view that such attitudes towards change were neither 'natural or inevitable' (p.26). While some close to retirement were not at all welcoming of the need to change (IF03), some of the oldest and longest-serving teachers at the school were the most enthusiastic (J200105-12).

At the end of 2004, the report of the school's formal evaluation of the first year of implementation of the LNSGM described the impact of the Model on teachers thus:

Whilst many respondents support, or even welcome, the changes taking place with regard to the introduction of the Loreto Normanhurst Student Growth Model, others are much more apprehensive or resistant to it and...are divided on the relative merits and perceived shortcomings of the Model as it has so far been realised. (Mockler et al., 2004, p.20)

Some problem areas were identified in this evaluation. Ninety-seven per cent of respondents agreed with the statement 'There needs to be more communication and connection between team members and other members of staff' and 80 per cent agreed with the statement 'I feel that other areas of the school have suffered because of the Loreto Normanhurst Student Growth Model'. Nevertheless, 82 per cent of respondents disagreed with the statement 'I wish that the school could go back to the way it was before the Model came into being' (EV09); and 82 per cent agreed with the statement 'I am committed to supporting the continuing development of the model'. Seventy-one per cent agreed 'I believe that I have a strong understanding of 'radical new pedagogy', providing further evidence of capacity-building, a key element of a 'continually reinventing' or learning community. These results revealed growing support for the direction, particularly between 2002 and 2004, but concern about structures. They provided an impetus for the further refinement and change which took place in 2005.

### **Administrators: within the school**

The members of the Leadership Team expressed positive views about the reinvention process, and their ongoing commitment and hard work, documented in researcher journals throughout 2001-2004, was testament to their dedication. Nevertheless, as Louis and Miles (1990) note, the pressure of managing the reinvention process, in addition to their normal duties as leaders of the present-day school, was burdensome to all members.

It has been seriously challenging and inspiring. At times it has been extremely difficult as changes have been resisted by many staff and the pace of change has been exhausting. (LT18)

The pressure of supporting staff through the changes and dealing with projected anger (Goepfinger, 2002), as discussed earlier, were also mentioned as challenges, but attitudes of optimism, hope and determination were also apparent (Hargreaves & Fullan, 1998, p.57) (II01; II05; II06; II07; II08).

I really feel I've been given a bit of a gift, I suppose, to be in a school like this that's sort of constantly looking forward, looking ahead...trying to meet the needs of our students and our whole school community, and I think that's pretty good. It's always a challenge though. (II06)

...[I]t was exciting, it extended me, it made me think of things that perhaps, you know, had been at the back of my mind for years, and I'd never had an opportunity to express or really do anything about. Yeah, so it was exciting, it was challenging, it was very, very difficult. (II07)

### **Administrators: external to the school**

Included in this category were the School Council, IBVM sisters, the Strategy Team and the external facilitator. Members generally expressed excitement about the potential of the reinvention to benefit students, an awareness of the risks involved, and of the likely resistance of staff. While some expressed frustration and apprehension, most experienced the reinvention positively, describing it as 'thrilling' (IF08) and feeling honoured to be involved in it.

From my perspective, it's been a bit of a mixed bag, sometimes exhilarating, sometimes terrifying. Sometimes incredibly sad in that, you know, you're confronted with people who are sad...and helping people to work through that...is really challenging. (IF08)

As people both watched and participated in shaping the new direction they are likely to have gone through a whole range of emotions from the 'Oh No' to the 'Ah Ha' moments. It was probably seen as long and somewhat tiring – often they were asked to press on without a clear picture of the destination. This may have tested their faith in both the process and the content at times. (KI-40)

A member of the School Council, from a corporate background, provided an interesting perspective on the respective challenges of change in a business environment compared with that in schools:

I've been fascinated by the whole process, I must say...the taking of risks. I think I can see why people haven't taken risks in education in the past. Taking risks in business in a sense is a lot easier, because of the structures, the systems and the consequences of it if you take a risk and you fail. You go out on a branch in this sense...you're dealing with people's children, education, long-term consequences, conservative organisations. I mean you've probably piled up against you just about every piece of deadweight you could against taking a risk or innovation. So you're doing it in a much more difficult environment actually than business, I think, for a whole range of reasons. But in a sense the reward consequently is much greater. (IF07)

## **The principal/researcher**

As discussed in Chapter 5, the principal/researcher filled several roles concurrently. While Chapters 4, 5, 6 and 8 address issues related to being an insider researcher and leadership, this section focuses on the principal/researcher as change agent and human being, and the first person is therefore used.

Developing the strategic perspective, an integral part of the strategy workshops in 2001, reinforced for me how much the world was changing and that schools had to meet new needs. I became increasingly aware of the magnitude of the change that was being proposed for the school and experienced many of the emotions reported by others in the school community: excitement at what this could mean for young people and their families, as well as for teachers; and apprehension at what it would involve. The years from 2002 until early 2004, in particular, were a mixture of exhilaration and angst (McCormick, 2001), as documented in researcher journals.

The exhilaration emanated from many aspects: appreciating how students would benefit from the LNSGM; being part of the learning and growth of my colleagues on staff, seeing the evidence of expanded awareness and implementation of learning theory, new pedagogy and emotional intelligence theory, as teachers worked with students; recognising my own learning and growth; the deep trust and shared purpose experienced with members of the Leadership Team; working beside so many staff for whom the LNSGM was their ultimate dream for students; and the gradual emergence of ways of turning that dream into reality.

The angst was caused by the keen awareness of responsibility – for the students in my care; for the staff; for the school, to the School Council, and, in the early years, the uncertainty of how to turn the vision developed in the strategy into reality. The inevitable conflict involved in a change process, and the negativity and cynicism of some staff, made it difficult to ‘maintain a clear focus while (taking) the concerns of resisters seriously’ (Fullan, 2001, p.74-5). The need constantly to build trust, and to combat tendencies towards mistrust, the weariness associated with leading a large and complex school, and working simultaneously on change in so many areas, were additional causes of angst for me.

Just as for Gerstner (2002, p.102-6), who often felt exhausted and wondered why he had agreed to the job of transforming IBM, there were times when I asked myself why I was doing all this. Like Gerstner, my energy and excitement was renewed by focusing on the challenge. More importantly, the sense of loyalty to the school community, and to the many people who were inspired by the vision of the Loreto Normanhurst Student Growth

Model, kept me working through the issues. Too often change in schools never comes to fruition. When schools pull back at the point of implementation (Deal & Peterson, 1994) and plans are not put into practice, a culture of cynicism develops among teachers and decreases the chance of effective change happening in the future (Louis & Miles, 1990). I needed support in order to lead such a major change.

The many demands of principal, change agent and researcher were managed by deliberately and frequently calling to mind why I was doing this, and also by a number of supportive relationships. The support of my husband and family was pivotal. A wide range of individuals and groups also provided support: the Chair of School Council, other Council members and many Loreto sisters; members of the Leadership Team; fellow principals; university academics; and those who supported me through friendship, professional supervision or spiritual direction. It may take a village to raise a child but it takes a range of caring individuals and networks to support the principal of a school, especially one leading major change.

Overall, the experience of the reinvention was positive for me, both personally and professionally. The possibility of meeting the learning and growth needs of students in new and better ways provided both motivation and personal and professional challenge. The reinvention process (and this research process) helped me to grow in my own humanity, particularly through the humbling experience of making mistakes and simply 'not knowing' (Braud & Anderson, 1998; Clements et al., 1998; Keane, 1987; Rohr, no date). I learned to balance my natural optimism, combining faith that, as a school community, we could prevail in the end, with a confrontation of the 'brutal facts', in what Collins (2001b, p.83ff.) describes as the Stockdale Paradox. I learned much about change, leadership, learning theory, and culture, and became more deeply committed to my spiritual roots, particularly in the most difficult phases of the reinvention process. Professionally, it was rewarding to work for what I believed, that education is about mind and heart and soul, 'the courage to teach from the most truthful places in the landscape of self and world, the courage to invite students to discover, explore, and inhabit those places in the living of their lives' (Palmer, 1998, p.183).

Finally, to conclude this phenomenological section, the views of a member of the Strategy Team provide a comprehensive overview of how people in the school community experienced the reinvention process:

I think these feelings of frustration and sadness and excitement are all part of...reinventing. It's an unknown path when you start out and you have to confront all those feelings, I think, when you're going to do something very differently, because you're treading on an untrodden path. And so I don't

think it's necessarily unhealthy that you are facing all those challenges and those feelings. I think you work through them. And I don't think we ever expected that everyone would be in total agreement, that's why we have a panel [the Strategy Team] with different interests and so on, to get all those different viewpoints, and to really thrash out the issues and work through the hard bits to do this reinvention. And I think in terms of the group, it's a good group of people who are willing to do new things. There are many places that would not be willing to take that option because of the risks involved in that process. (IF08)

School community members expressed not only how they experienced the reinvention process but they also identified factors which they considered to have either assisted or inhibited it.

### ***Factors which assisted the reinvention process***

Factors which assisted the reinvention process included the strength of the need for change, values, leadership, the inclusivity of processes and efforts at constant communication and, interestingly, the mistakes made. The discussion below, with accompanying tables, presents the findings related to a range of stakeholder groups within the school.

### **Staff perceptions of factors which assisted the reinvention process**

In the surveys of early 2004, completed by 107 respondents, staff were asked to identify three factors which helped the school to reinvent itself. The major factors named in open-ended responses are included in Table 7.7.

<b>Priority</b>	<b>Factor which assisted the reinvention</b>	<b>% of staff responses</b>
1	Staff dedication	51%
2	Leadership Principal	32% 32%
4	Vision, foresight	29%
5	Mary Ward, the Loreto sisters, values and tradition of the school	25%
6	Determination, courage	19%
7	ICT (technology)	18%
8	Global and educational changes Commitment to change Finances, resources	15% 15% 15%
11	Inclusivity of the process	13%
12	Support of the School Council Clear direction	12% 12%
14	Student needs Parent expectations/ support	9% 9%
16	Innovation, blend of theory and practice	7%
17	Passion for the needs of students	6%
18	New buildings Integrity Communication	4% 4% 4%

**Table 7.7 Factors which assisted the reinvention process. Staff survey responses, January 2004**

In some responses a range of factors was grouped, for example:

[The] courage of staff [and the school's] groundedness in values (HoD/HC5);

[A] leader (Principal) with [the necessary] vision and guts to take on new challenges (T43);

A School Council that committed the resources to enable the whole school community to be involved. (T66)

Several conclusions can be drawn from these data. Paramount in the eyes of staff was awareness of their own part in the success of the reinvention process: the number of staff responses citing staff dedication as a factor assisting the reinvention process was substantially higher than for any other factor. The principal/researcher agreed that, without staff support and commitment, any change in the school was unlikely to succeed. Leadership, whether as a concept, or in the performance of the principal and Leadership Team members, was also viewed as a major factor in assisting the reinvention process, and so was the part played by values, and vision for the future. In fact, the first six factors named by staff as important to the success of the reinvention process were associated with inspiration of various types, not with structural or practical measures. These data, therefore, reinforce much of the literature on change, which emphasises the need for a valid and inspiring reason to undergo the stresses of major change (Beare, 2001; Fullan, 1997a; Fullan & Hargreaves, 1998; Hargreaves & Fullan, 1998; Starratt, 2003). Factors identified by staff were also named by members of other stakeholder groups in focus group interviews.

### **Students' and parents' perceptions of factors which assisted the reinvention process**

As Table 7.8 illustrates, on many points, there was agreement between students, parents and the 'administrators' group. Students identified the attitudes of both teachers and students as supporting the reinvention:

The teachers are really focused on getting the best work out of us. (IF09)

They [students] understand [even though they might not personally benefit] that in the long term this will benefit Loreto as a school. (IF09)

Parents in focus group interviews referred to external factors. These included changes in society (IF05; IF06) and the nature of education ('the very nature of education demands constant introspection and the demand for change') (IF06), as well as attitudes toward and processes for change ('a place where change is regarded as normal, [not] something that you only did if something was broken') (IF06), and the involvement of parents, as assisting the reinvention.

<b>Students and parents</b>	<b>Administrators *</b>
Dedicated teachers	The commitment, enthusiasm and involvement of staff
Changes in society	Global changes in Church, society and education, including the use of technology and the need to address the emotional well-being of young people
Communication and openness with parents and students Wide consultation	Extensive communication with parents, and other stakeholder groups A rigorous and inclusive process
The ability of the school's leadership to promote the idea	The vision, leadership and example of the principal The calibre, commitment and determination of the leadership of the school
The courage of the school to make changes	The principal's capacity to take risks and follow-through
	Clear articulation of the school's vision and a common understanding
Well-defined goals	
The future-oriented approach of the school	
The school's approach to and successful history of change	
The support of the student body	
Mary Ward's tradition and philosophy	The Mary Ward charism and the mission and faith dimension of the school
	The support of the IBVM and School Council, including financial resourcing
	The emphasis on professional learning
	The stimulus provided by the external facilitator
	'Earnest and deep thinking' and a basis of educational theory Constant review and monitoring of the process

\* This group included The School Council, Strategy Team, some IBVM sisters, the Leadership Team and the external facilitator.

**Table 7.8 Factors which assisted the reinvention process, by stakeholder group, Term 1 2004**

Parents in focus group interviews referred also to the calibre of personnel, particularly the leadership of the principal, and her ability to appoint good staff (IF05; IF06):

Any school is only as good as its leader (IF05)

Always within the staff [there is] that search for new ideas, new ways, new thoughts, new processes...[and] that then echoes through to the genesis of an idea like this (IF04).

The school's underpinning values, tradition 'Mary Ward's sort of tradition and philosophy' (IF06) and philosophy of being 'receptive to new ideas and learning' (IF06) and the goodwill of staff, parents and students... 'capitalising on that goodwill has been a strength in terms of moving towards the new process, because it's been a leap of faith' (IF04) were also cited as supports for the reinvention process.

## **Administrators: within the school and external to the school**

Factors named by individuals within these groups as assisting the reinvention process included:

1. Global changes in Church, society and education, including the use of technology and the need to address the emotional well-being of young people (LT18; LT23)
2. Clear articulation of the school's vision (LT18; LT19) and a common understanding, based on a strong Intent statement which focused the school community (IF08; I03);
3. The Mary Ward charism and the mission and faith dimension of the school (IF07; IF08; LT18; LT19).
4. The support of the IBVM and School Council, including financial resourcing, to enable staffing, release time and building programs (IF07; LT18; LT22);
5. The commitment of many teachers (LT19; LT22);
6. A rigorous and inclusive process (LT19; LT21), which ensured that 'we've not tried to steer away from the hard parts', 'earnest and deep thinking' devoted to every important aspect (IF07; IF08; I03) and constant review and monitoring of the process (IF07);
7. The 'commitment, enthusiasm and wholehearted involvement' of the staff (I02);
8. Extensive communication with parents, and other stakeholder groups (I02; IF07);
9. The emphasis on and resourcing of professional learning (I01; I08);
10. A basis of thorough and ongoing research and educational theory (IF07; IF08);
11. The stimulus provided by the external facilitator (I01; I08); and
12. The vision, leadership and example of the principal (I02; IF07) and the calibre, commitment and determination of the leadership of the school, and key players (IF07; IF08; I03; LT18; LT19; LT21; LT22; LT23). These participants identified the following factors as assisting the reinvention:

- able people around the principal who have worked hard to support her vision, some of whom were well educated in current educational theory;
- the principal's leadership...a transparent wish to do the right thing by the girls and by their parents;
- the principal's capacity to take risks and follow through. (I01; I05; I06; I07; I08).

Most of the above factors, identified by a range of stakeholder groups as assisting the reinvention process, have been discussed earlier. However, factors associated with leadership are addressed in Chapter 8. The fact that there was relative consistency across stakeholder groups in their naming of factors which supported the reinvention process provides triangulation for this study. Further, this consistency reinforced the views found in much of the literature on change in schools (for example, Duignan, 2004b; Fullan, 2001; Hargreaves & Fullan, 1998; Larson, 1992; Louis & Miles, 1990; Marzano, 2003; Mitchell & Sackney, 2000; Riley, 2002; Starratt, 2003) on the importance of a clear vision, inclusive processes, a focus on student outcomes, and effective leadership.

## ***Factors hindering the reinvention***

Problems in a reinvention process are inevitable, and the reinvention of Loreto Normanhurst was no exception. The views of staff, those working hardest to make the reinvention a reality, on the factors which hindered the reinvention, are grouped in Table 7.9.

	Number of responses	Fear, mistrust	Staff resistance	Entrenched viewpoints, unwillingness to change	Pace of change, lack of time	Lack of details, lack of prototype	Lack of resources	Communication problems, links between teams	No need for change	Day-to-day issues	Complexity of the change	Differences of opinion, staff politics	New working conditions	Poor facilitator	N/A It has moved ahead
Leadership Team	6	3	2	1	1	0	1	2	1	0	0	0	1	0	0
Middle Managers	14	6	3	1	0	3	2	0	3	2	1	1	1	1	2
Teachers	29	6	4	6	9	6	5	4	2	3	4	1	0	1	0
Support Staff	14	6	5	5	3	2	2	2	0	0	0	1	0	0	0
Boarding Staff	3	0	2	2	0	0	1	0	0	0	0	0	0	0	0
Total %	66	30	24	23	20	17	17	12	9	9	8	5	3	3	3

**Table 7.9 Staff responses to the question ‘What made it hard for the reinvention process to move ahead?’**

It is useful to place the views of staff into a broader framework, and to include the views of other stakeholders in doing so. Louis and Miles (1990) grouped problems in the change programs they studied into clusters: program-related problems; people-related problems, and setting-related problems. This framework is used to group the problems encountered in the reinvention process at Loreto Normanhurst.

### **Program-related problems in the reinvention process**

#### **Program process**

Program process problems included the negative reactions of staff to the external facilitator. They also included industrial conflicts within the school, in 2003, over teacher conditions for Team members. These teachers were required to work together as a Team for two weeks of student vacation time, as well as for four hours each week outside student contact hours, in return for a substantial extra payment. The industrial conflict was resolved through negotiation both with union leaders within the school and also with the most senior administrator of the teachers’ union. Other program process problems included confusion in a range of areas, such as the locus of implementation decisions, and in the operation and interrelationship of multiple teams. Lack of some details of implementation, and difficulty in finding a mechanism for communication of implementation

Team learnings to the Year 7 Team, led to frustration. Both line managers and internal resource personnel needed to work together with the Team, and problems developed around this intersection.

### **Program content**

Coherent and agreed understanding of the nature of the holistic education, which was the basis of the reinvention, had to evolve. There were differing understandings of holistic curriculum and pedagogy within the Leadership Team, and some staff saw it as an 'add-on' rather than a totally different way of high school education. Clashes over the amount of time allocated to subjects, concern at non-specialist teachers teaching subject-based outcomes within the Integrated Learning program, and the 'contested ground' (Little, 1995) over the respective roles of faculties and Year Teams were further program content problems.

## **People-related problems in the reinvention process**

### **Target population**

The difficulty in involving students from Years 8-12, and parents, has already been discussed. Efforts to engage all parents, particularly through information sessions, were more successful than most parent workshops conducted by the school, in that approximately 60 per cent of families were represented. However, there remained a large group of parents whose opinions were formed through gossip rather than facts. It was also a challenge to fully engage students already in the school prior to 2004, as the structural changes of the LNSGM would not impact on them directly, and there was a risk that these students would feel second-rate.

### **Lack of skills**

The reinvention process was impeded by difficulties in project management (Fullan, 1991, p.93-4). Despite the existence of the Strategy Core Team, which was set up for this purpose, it was difficult to develop and communicate an overview of the process, so that all participants could see where they fitted in (Bridges, 1995), often because this was in a state of constant development. Assumptions on the part of the principal about leadership for major change were not always effective and at times inappropriate delegation was made, which resulted in problems, and is discussed in Chapter 8. The principal and Leadership Team needed more skill development in managing conflict, as discussed later in this chapter. Staff skills were needed in a range of areas, such as learning theory, programming for holistic curriculum, and emotional intelligence (EQ) skills to cope with

change, conflict and teamwork in order to offer the new paradigm of learning and growth to students and parents.

### **Attitudes**

The problem most often identified by participants in all sectors of the school community was that of staff resistance, which was based on people's fears of change, fears for their employment, fear of being or appearing inadequate, and fear of losing what was precious to them in the school (see Table 7.1). Differing interpretations of the school's values were apparent (II06; KI-20; J200303), and significant 'gate-keeping' was practised by some, particularly in the earlier years of the reinvention process (II06; II08; KI-11; KI-31; KI-20). Aspects of the staff culture, including a prevailing attitude of mistrust (J200206; J200303; KI-15; KI-03; KI-31), negative attitudes towards the Leadership Team (IF01; IF10) and, in some cases, outright rejection of line management (J200304; J200402; KI-11; KI-15; KI-13), were further problems. Some of these were partly addressed by the principal's taking a direct role in the implementation of the LNSGM as 'Team Director' in 2004. Further discussion of the school culture occurs later in this chapter.

## **Setting-related problems in the reinvention process**

### **Competing demands: external and internal**

Time and energy were taken from the reinvention process by a range of external pressures. These included the demands of new externally-imposed syllabuses, preparation for the formal inspection and registration of the school by the New South Wales Board of Studies, as discussed in earlier chapters, (although this was turned into an opportunity for securing system endorsement for the reinvention). Added to these were ongoing battles about building approvals and constraints on the school's property with the local municipal council from 2001 to 2004, mounting external accountability requirements, and legal and industrial pressures to provide part-time work for staff, as discussed in Chapter 2.

The departure of key personnel also had a major impact, in particular from the role of Director of Student Learning. For a variety of reasons, no fewer than five people filled this role between 2001 and 2004. One person, who was acting in this role in 2003, became ill and needed to take extended sick leave. She did not return to the school, and her work fell on the rest of the Leadership Team, who were already under pressure, and particularly the deputy principal. In addition to this extra workload, the reaction of staff had to be managed, as her illness was seen as a direct result of pressures of the reinvention process. Managing building and refurbishment programs, student and parent issues and

whooping cough epidemics in the boarding school were further examples of the normal crises and events which had to be managed as well as the reinvention process.

### **Physical plant and resources**

Finding adequate space for the increasing staff numbers was a problem, as were the delays in completion of new learning spaces, which is discussed in the next section. Controversy among staff about future building priorities and relocation also had to be managed. Lack of time to prepare for and implement aspects of the reinvention was frequently mentioned in the data, together with feelings of overload.

We are on board a juggernaut. (HoD/HC13)

[There are] inadequate time-lines – but [these are] unavoidable because it's hard to set a realistic timeline for things that have never been done before (T31)

It's been immensely exciting in many, many ways, but it's also been incredibly pressured and very stressful as you try to balance the demands of your day-to-day job with the demands of strategic planning. (I105)

Concern about sustainability was mentioned in several focus group and individual interviews and included aspects such as finding sufficient funds and staff for the roll-out of implementation. Staff and parents, in some instances, believed that 'too many resources and time and money is going into the new process and that they are wearing the results of that...that we are cutting corners in other areas [across Years] 8-12, so that Year 7 can have everything' (IF08). Some community members, particularly parents and some Strategy Team members (IF08; IF04), were concerned about sustainability in terms of succession issues. If the principal left, the reinvention may be compromised (J200105-12; I108). Others, however, noted that the reinvention belonged to all and would continue, reinforcing the notion that 'authority need not be located in the person of the leader but can be "out there" in between and among people' (MacBeath & MacDonald, 2000, p.23).

I wonder sometimes...would we slide back into old ways if there was a change in leadership?

Well, when we're talking about leadership here, are we talking about one leader or are we talking about leadership in its totality? Because I'd hate to think that if we're referring to L as the leader, and she left, that it all dissipates. [We have a] group of leaders that ...have an element of understanding of what this is all about. I mean it's a group responsibility. (IF08)

### **Structures and procedures**

One ongoing problem lay in trying to keep up communication to school community members, when what they wanted/needed to know was still 'a work in progress' and only gradually becoming apparent. A second lay in trying to find a structural solution which would link the academic and pastoral structures with holistic Team structures, without the need for excessive meetings. The desire to maintain the school's vertical pastoral system,

while also introducing a horizontal Year-based structure, and to maintain faculties as well as Year-based Team structures, provided a challenge. The Epilogue section of this chapter discusses the structural solutions devised and implemented in 2005. This was an example of the frequent attempts to use a 'double-loop' learning approach (Argyris, 1992a), trying to ascertain what factors may be contributing to the difficult situation, reframing it wherever possible and seeking a lateral solution.

As Louis and Miles (1990) argue:

implementing serious change in urban high schools is a problem-rich enterprise. The chances of a given problem appearing at some time in the life of a change program are well over 50 percent. Furthermore, major or near-intractable problems are nearly as frequent. Problems of the program itself are easiest to solve; "people" problems come next; and "setting" problems of structure and procedures are most difficult to solve. (p.271-2)

Although Loreto Normanhurst is a suburban Australian school, rather than an American inner-urban school, many of Louis and Miles' (1990) conclusions are also relevant for this study. There will always be problems and paradoxes, as Handy (1990) points out, but the way in which schools cope with problems largely determines the quality of the solution. Louis and Miles (1990) suggest three coping frames: technical, in which social and technical resources are used to solve the problem; political, where people are mobilised to do what is needed, conflicts are managed, and supportive coalitions are developed; and cultural, which focus on the shared beliefs and values which give meaning and hold people together.

A wide range of coping methods was used in the Loreto Normanhurst reinvention process, with strong emphasis placed on the cultural coping frame. Requiring all staff to be part of a strategy workshop, connecting with the school's core values, and being involved in setting the school's direction were cultural coping methods which inspired passion, excitement and energy in a great many staff. The emphasis placed on the values of the school led to a greater emphasis on cultural coping, where people moved towards personal embracing of change because of its merits and its alignment with the school's tradition. This emphasis was acknowledged in data from all stakeholder groups in the school (see Tables 7.7 and 7.8). The relative success of these methods indicates that the school's values were not only upheld through the reinvention process but also sustained it.

Political coping methods, such as providing many forums for discussion and involvement, and ensuring broadly based task forces, avoided 'balkanising the opposition' (Hargreaves & Fullan, 1998). Technical methods, including establishing new roles and groups, providing time release, and ongoing professional learning, were also used, and had some success in addressing problems associated with the reinvention process. As data

presented earlier in this chapter illustrated, staff opinion was divided on whether these methods were effective. As discussed earlier, most staff considered the process to have been inclusive and appreciated the opportunities for involvement, professional learning and the provision of dedicated time. Some, however, felt left out, their voices unheard, and worried about missing classes when/if time release was provided on an *ad hoc* basis.

### ***Other impacts of the reinvention process***

Architecture, technology, enrolments and employment patterns were further aspects of school life affected by the aim to reinvent the school so that it could meet the needs of 21<sup>st</sup> century students.

#### **Architecture**

It was acknowledged that 'radical new pedagogy' (J200302; J200203-04) required more flexible learning spaces than traditional school architecture provided. The relationship between form and function meant that 'egg-crate' architecture (Beare, 2001, p.88) was limiting to both students and teachers. Following discussions with architects, visits to other relevant school sites, and reference to the literature (Bunting, 2003; D. Campbell, 2000; Eadie, 2001; Stuebing, 1995), the school hall was renovated to create a large open-plan learning area (see Figure 6.7) which accommodated both Year 7 students and their advisors, the Year 7 Team. The new design meant that students and teachers could interact in more flexible and casual ways, and that students had the opportunity to work in fluid ways, as determined by their learning needs: alone, in small groups, in large groups, and with technology. This was a significant departure from traditional school design, where teachers work together in staff rooms rather than sharing work space with students. The new design redefined the 'workplace', and the relationship between teachers and students.

Work began in late 2004 on a second flexible learning space, incorporating some existing areas within the school. This was to be known as the Teresa Ball Centre (named after the sister who brought the IBVM to Ireland, the first 'Loreto' sister.) As with the Deirdre Rofe Centre, discussed earlier, the naming of buildings was an opportunity for incorporating the school's stories and values into the everyday life of the school. New buildings to support the 'radical new pedagogy' were also planned in 2004 for completion in future years, subject to available finance. The school planned a capital appeal for 2005 to raise the necessary funds.

## **Technology**

Loreto Normanhurst had, for some years, been considered progressive in its use of Information and Communication Technologies (ICT) both in administration and in pedagogy (see Chapter 2). The way in which the school supported staff to embrace ICT for both learning and administration provided experience of a successful change process which could be built upon in the reinvention process (Louis & Miles, 1990), and staff felt well supported in the area of technology (see Table 7.3). Further, the use of email for internal communication, since September 1996, facilitated interaction and communication throughout the reinvention process, without the need for constant meetings. Portal technology, using Microsoft SharePoint, was introduced in 2004, and this enabled staff, students and parents to access easily a range of information generated within and beyond the school.

In 2001, when it was decided that each student would have a Student Growth Plan, which would be digitally recorded and preserved for the six years of her high school education, the technology to support such an ambition did not yet exist. Undeterred, the school's Director of ICT worked with external ICT companies to develop a prototype system which would meet the school's needs. This system was operational from the start of 2004, at which point every teacher and student had their own 'digital portfolio' or 'My Site' on the school's network to store their work in progress, as well as their archived records, and which could be shared with others, if desired, through the use of portals.

## **Enrolment and employment trends**

In 2001, as part of the strategy process, it had been anticipated that enrolment and employment trends would be affected by the school's new direction (Dart, 2001). Enrolment trends indicated continued parent confidence in the school. No student was withdrawn from Year 7 2004 as a result of the LNSGM, and there was full enrolment for Year 7 2005 at the end of 2004. Leadership Team members, who interviewed all prospective families, reported knowledge of and interest in the new Model, with many parents citing their choice of school was influenced favourably by the school's progressive approach to education.

In 2001, it had been anticipated that staff mobility would increase, as teachers sought promotion as a result of their increased capacity and other schools actively sought to recruit them, and it was predicted that some teachers, uncomfortable with the school's direction, would seek employment in more traditional schools. Employment trends followed the patterns predicted in 2001, as shown in Table 2.1. While only one teacher expressly cited the LNSGM as the reason for departure, several left for more traditional schools.

Others left for promotion positions in a range of schools or other educational areas. However, increased mobility was also evident throughout New South Wales schools, and across all areas of employment, with one study claiming that 70 per cent of workers surveyed were keen to change employment in 2006 (AAP, 2006). This mobility put additional pressure on the school, both in terms of the human and financial resources required to replace and induct personnel, and also because of student and parent desire for staff stability.

In summary, the reinvention process aimed at 'turning the school on its head' (II02), so that it revolved primarily around the needs of students rather than of traditional subjects (Handy & Aitken, 1986; Little, 1995; Meier, 1992). Such a focus was in sympathy with Mary Ward's vision of schooling.

### ***Mary Ward's values and continual reinvention***

Chapter 6 referred to the way in which Mary Ward's values were retained and/or enhanced through the new learning paradigm, the Loreto Normanhurst Student Growth Model. This section focuses on the extent to which the aim of becoming a continually reinventing school, and the reinvention processes themselves, reflected Mary Ward and Catholic values.

Substantial evidence was found in the data, particularly from staff surveys and transcripts of individual and focus group interviews, that school community members saw Mary Ward's values clearly reflected in the aims and the processes of the reinvention. The following excerpts from staff surveys illustrate this:

Questioning and discourse is central to faith development – [and is] therefore central to genuine Catholic tradition. (HoD/HC6)  
(The implication in this response was that the reinvention process had been a process of continual questioning and discourse.)

We've taken on the status quo and have come up with a response to the challenges posed by external, technological and social changes. Mary Ward also was aware of the circumstances of her times and challenged them! We've been inclusive; we have taken the time to consider options and to refine our ideas i.e. discernment, which to me is the essence of all Loreto values. (S71)

[Mary Ward's values have been lived out by the school community's] engaging in critical reflection, innovating, actually living the principles we articulate – there had been some stagnation previously. (T31)

I think the reinvention process has seriously challenged us to really engage with the radical heart of the mission of this school. It feels to me like a return to a courageous embrace of a counter-cultural statement and I feel part of a community which risks 'dangerous' innovations. (LT18)

There was little in the staff survey data in response to the survey question 'Is anything not in keeping with Mary Ward's values in what has been done through the reinvention?' The few comments which were made referred to 'travelling too fast', the pressure that the changes placed on people, and concern at treatment of staff, 'People have often been neglected' (HoD/HC7).

Interviews of governors, owners, school leaders and the Strategy Team provided further evidence that the school community saw that the aim of continual reinvention, and the processes used to achieve it, were in keeping with Mary Ward's values:

[G]oing back to your question as to whether the strategy is still within the tradition of Mary Ward...I think it is, because...you're being innovative. One of the traditions is change; one of the other traditions is challenge [and] genuine reform. I think all those things have happened as part of this strategy...[S]pecifically for what was introduced this year, and what will be introduced in the foreseeable future, you are true to those specific traditions of innovation, genuine reform, change.(IF07)

Mary Ward...expected change. [O]ur mission is to use the means congruous to the times, and...that's ever changing, and asks us to reinvent ourselves all the time. So I'd see it as eminently Mary Ward. (IF08)

Mary Ward was, you know, a woman desirous of being an example of Christ, and somewhere in that spirituality the transformation that is the Christian spirit and tradition ...is perhaps being seen here and now in the way that it wasn't expressed before and I find that very exciting. That it's in fact built into our school's spirituality, if you like, that you're supposed to move and change and grow, even our intent ...**growing individuals and communities**... flags that...I think...that situates us very much back in the heart of our Christian spiritual traditions. (IF08)

Well, if I talk about the processes...I think the process of change that you've used, as far as I can observe, has been very respectful of people. You want people to think about it and reflect on it and to give their, put their penny worth in... I think that whole process that you've worked through has been very respectful of people and of where they're coming from, giving them an opportunity, you know, to understand and to deepen it and to grow with it. And it's challenged them too. (II02)

I hope that with the framework that we've got in place here, that students will have a much greater opportunity to actually experience those sorts of things that Mary Ward talked about authentically, and in greater numbers than [has been possible up to now] ...[P]articularly through the integrated curriculum, where we're giving the students an opportunity to think, to reflect, to problem solve, to make a difference, and to make statement. To do something about an issue that they feel strongly about, to go out and experience something that they might not have experienced before, rather than having somebody come in and just talk to them. I think we've endeavoured to make the whole program much more real for them and we have developed that structure all the way through to...Year Ten already. (II07)

Focus group interviews with staff revealed less unanimity. Some participants saw that the aim of continual reinvention was in keeping with Mary Ward values, but that some of the processes were not. Some of these comments reveal the desire for greater clarity than the leaders of the process were able to provide at the time, since the whole process was intended to evolve through the ongoing involvement of the school community.

I think that the end product is...very much in line with the Mary Ward values. You know the ideas of innovation, connectedness, all of these things. But I think [in] the process, I think they really did get overlooked quite a lot. (IF01)

I think there's a lot of good at the basis of the reinvention, I think there's a lot of Mary Ward values as the basis and in the end product of what we're trying to achieve for the girls...accepting the challenge of change. and challenge and change being a part of Mary Ward. I think we've accepted that change, we've accepted the challenge. (IF01)

...I don't think that we're being dealt with, with integrity, because we're not being told where we stand, how we do this, what to do etc. (IF01)

[W]e all did a day and a half's training on the strategy and we were all led to believe it's going to be this new wonderful thing and everyone sort of got caught up in the enthusiasm...I think it was definitely based on Mary Ward values then, but then it sort of petered out. I don't know if it's because they got too busy and they were working it out themselves, but suddenly the communication stopped...So in that respect no, it doesn't really follow the values. (IF03)

These different views illustrate that there was a range of 'voices' and perspectives in the reinvention process, which was just one of the learnings derived from this study. In the final section of this chapter, the research question 'What were the learnings from the reinvention process?' is addressed.

### ***Learnings from the reinvention process***

The main conclusion drawn from this reinvention process is that it is very difficult to reinvent a school (Collins, 2001b; Gerstner, 2002; Little, 1995; Meier, 1992). 'Turbulence is the norm' (Louis & Miles, 1990, p.288). While avoiding any attempt to provide a blueprint for reinvention, as the context and internal factors vary so widely between schools (Fullan, 1998a; Sergiovanni, 2000), the researcher/principal drew conclusions from this reinvention process relating to values; culture; will; capacity-building; the influence of this study on the reinvention; and leadership. The first four of these are discussed in the remainder of this chapter, while the conclusions regarding leadership form a separate chapter, which follows, and those relating to the influence of the study of the reinvention have already been addressed in the previous chapter.

## Values

The ability to draw from the particular history and values of the school as a Catholic school in the Mary Ward tradition had a significant positive impact on the reinvention process. Limerick, Cunnington and Crowther (1998, p.162) refer to such values as 'transcendental' in that 'they hold true, whatever the field and whatever the particulars of the situation – they are held to be universally true, and are ends in themselves'. There had long been a strong allegiance within the school community with the values of the school (see Appendices 1, 4 and 15). Annual surveys of the parent body and of Year 12 students between 2001 and 2003, for example, demonstrated that between 73 and 96 per cent (average 86 per cent) of respondents agreed that the school lived out the specific values of its Mission Statement and Intent.

Adoption of a hermeneutic perspective – a strong aspect of the Catholic tradition as well as a research technique - encouraged individuals and the school community to translate those core values into a new time and place. The place of prayer and of reflection, part of both an Ignatian and Mary Ward approach to spirituality, was valued and incorporated, both in the reinvention process and in the LNSGM. As the 2001 strategy document stated, 'prayerful critical reflection will be essential' (see Appendix 15, Annexure 3). Shared values thus acted as a 'community glue', determining and reinforcing both the ends – religious faith and its expression in daily life, the focus on students and parents, commitment to both individuals and community, and belief in the capacity of women to contribute significantly to church and to society – and the means - risk-taking, courage, persistence, passionate creativity, integrity and wisdom. This was noted by a parent who works as a strategy consultant (J200407, KI-08), who saw the school's values base as a major factor in the success of the reinvention.

Significantly, one of the most powerful weapons within the school culture was to accuse another person or group of not being true to Mary Ward or Loreto values, as revealed in some transcripts in this study (IF01; IF10). While such accusations might have referred to gaps between espoused values and theory-in-use (Argyris, 1992a), discussed in Chapter 3, they can also be explained by Novak and Fine's (1996) theory of the differing interpretations of values within the staff culture(s). Processes which enabled access to and personal connection with the stories of the IBVM founders enabled the school community to have a 'shared story' and to distil from those stories the core values of the tradition. These processes also helped to align alternative assumptions about the core values (II06; J200302; J20303; KI-03).

...because they've been here a long time (they think) they understand the way a Loreto education is, but that's not actually true. It's...tied up

with...gate-keeping...that sense of 'this is the way we do it round here'.  
(II06)

Attempts to align interpretations of the school's values were an example of how the paradigm shift which the reinvention process was effecting impacted on and changed some aspects of the culture of the school.

## **Culture**

Many aspects of culture impacted on the reinvention process. Aspects of the culture relating to shared values, and the professional pride and dedication of teachers to student learning and relationships were positive impacts. So too was the history of successful change initiatives (Louis & Miles, 1990) (see Chapter 2). Students spoke openly of their love of the school and its spirit (J200105-12), and staff were proud to work there, as revealed in Year 12 and staff exit surveys and other surveys. Yet the staff culture was paradoxical, as Schein (1992) describes, and as Gerstner (2002) experienced in the reinvention of IBM.

More challenging aspects of the staff culture in relation to the reinvention process were the tendencies to perfectionism (Fullan & Hargreaves, 1998; Marzano, 2003), which several staff had expressed as a concern (HoD/HC9; J200302; J200305; J200306; J200307; J200406; J200311). There was also an apparent lack of openness and trust. While, on the one hand, teachers often expressed vehement disagreement in public and private forums (for example, II04; II05; II06; II07; II08; J200210-12; J200305; J200402; J200403), there was a perception that there was no forum for 'staff voice'. Excerpts from the Strategy Team focus group interview provide an insight into this issue, and the confusion experienced by others as well as by the principal/researcher, when so many opportunities for inclusion and discussion were provided:

I feel like I've had a voice, I've had something to say and I've been heard. But I do know that is not the general feeling of the general staff here at Loreto. There are many people on the staff who for whatever reason haven't felt that they've had a voice, and I can't understand that, with the workshops and so on that we've done over the past few years. But for some reason they feel like they didn't get a say and it wasn't their idea or there's a resentment. (IF08)

I think there are some staff that are still concerned in terms of the new learning paradigm about job security. And the fact that for example, you know, they may not feel that they can change and that teaching style's not going to suit them. So what do I do? Where do I go? That type of thing. That's my perception, because you know in four years we're going to be working in four different teams, you're going to have to change the way you work with seniors, change the way you change the faculty. So that keeps airing, you know, in regards to job security. The other impact that I just noticed was that it concerns me that staff won't speak those concerns

at staff meetings, but that they will do it at Union meetings and that's been an impact. So that's, I've sort of been trying to come to grips with that, you know, I mean when the forum is there for everyone to air that, but if it's not done during our staff meeting, it's done for example when we're having a union meeting. So that's an impact I think, and sometimes issues that are raised at that union meeting are not union issues, but it's a platform for airing. (IF08)

I think I find that comment about staff at staff meetings quite interesting because...I have heard some pretty strong opinions aired at staff meetings, where I don't know, if I had been in the firing line, I would [not] have coped at all, because some of them were quite personal and very, very critical. So there's...something going on in there, out there in the general staff, that I don't understand. You know, I just don't understand. (IF08)

At the same time there was a perception of a 'culture of fear'. Some staff felt that this was partly because of teachers' fear of offending peers and 'not saying too much or speaking out in case someone gets upset', or for fear of appearing a 'whinger' (IF10). Further, a key informant from outside the school, who worked with staff (KI-07), perceived that among Loreto Normanhurst teachers there were not high levels of trust. The turbulence experienced in several staff groups between 2001 and 2003, in some cases requiring external mediation, would support this view. Other internal key informants also spoke of some staff being 'precious', or negative and the school culture was one 'where people do not like to confront' (J200203-04; J200206; KI-14; KI-16; KI-31; KI-36). Some key informants spoke of the concern of staff nearing retirement and unwilling or unable to be involved (J200206, KI-15; IF08), supporting the view of Mulford and Silins (2003). Others spoke of the long-standing 'difficult' staff culture within the school (KI-21; KI-01).

This 'subterranean' culture (Miles & Huberman, 1994) was cultivated, perhaps unwittingly, by some powerful figures among staff (J200105-12; J00207-09; J200210-12; J200301-05; KI-04; KI-08; KI-11; KI-12; KI-20). One staff member expressed it thus:

I have taught in lots of other schools, [but] I have never been in a school where there is such a climate of...mistrust...everybody seems to be always looking for some underlying reason why a decision might be made. And it's always with some negativity...It's just very hard for people here to take things at face value...They don't come [to a meeting], in case somebody's taking names...In general, people have a great deal of difficulty in speaking out, when it might be seen that they're rocking the boat somehow. (KI-04)

It should be noted, however, that there were a great many positive and supportive staff, and many volunteers for membership of the wide range of task forces and committees used to develop and implement the strategy and the LNSGM. The reinvention process resulted in some polarisation among staff, which diminished over time, as the following comments illustrate:

I don't think polarisation is too big a view. [T]here were people who were fairly vocal in their opposition, fairly vocal in their...just dissatisfaction with the direction, and there were other people who sat back and said 'look, I don't really understand it, I'm not comfortable with it, but just tell me what to do and I'll do it.' The climate though in the Union meetings was certainly evidence for polarisation I would say, but that view wasn't expressed as strongly outside Union meetings as it was within. (II07)

Do you think if there was that polarisation that it's abating? From my perception I thought it was abating. That if there was, if there was that two poles, that I think as time has gone on, and as more information has filtered through and as members of different departments have entered the Year Seven Team, I would have thought that polarisation had lessened. (IF02)

From 2002, some staff members commented that the staff culture was beginning to change (J200202; KI-15; J200407) and the principal/researcher's ongoing efforts to name and address this issue with middle managers (J200408) and through the SETt (J200408) resulted in more open dialogue. There were more shared efforts to change the 'culture of fear' and some spoke candidly of their experience and recommended particular literature, which the principal/researcher found useful (Patterson, Grenny, McMillan, & Switzler, 2002). By the end of 2004, one key informant (KI-13) noted 'the embedding of the strategy and the huge change over the last six months...that the negativity had now gone from staff' (J200410). In the view of this key informant, the principal/researcher had had a major impact on this change, as a result of her major decisions early in 2004, discussed in Chapter 8: 'staff trust you' (J200410).

Some key informants (KI-01; KI-03), considered that the difficulties in the staff culture might be associated with the first-generation lay leadership phase of Catholic schools, and a reaction against the perceived need to comply without question with the wishes of a religious leader. This issue is explored more fully in Chapter 8.

As the previous discussion illustrates, the reinvention process impacted on the culture of the school. The range of opinions and proposals inevitable in a reinvention process (Starratt, 2001) resulted in some conflict but ultimately in more openness, and a gradual move from blame to a mutual problem-solving approach. Engagement with macro-level educational issues brought with it higher levels of teacher professionalism. The constant changes required in a reinvention process accustomed the school community to coping with change as part of the everyday life and culture of the school. The changes in physical space and architecture impacted significantly on relationships among all sectors of the school community. The work of teaching and learning became a public rather than a private activity, and more creative pedagogy was possible. There was a reflexive dynamic in the relationship between reculturing and restructuring (Fullan, 1998a; Sergiovanni,

1996): as attitudes changed, so did practice, and as people experienced structural change, this impacted on their attitudes.

Such a shift in the culture of the school was essential for it to become a learning community, a 'continually reinventing' school (Argyris, 1992a; Schein, 1992). As Gerstner (2002) realised, changing the culture of the organisation was at once the most necessary and the most difficult of his tasks as leader. It required considerable commitment and strength of will to pursue the reinvention of Loreto Normanhurst.

## **Will**

'The leadership has been outstanding, but it's also been bulldoggish...for any sustained change somebody has got to be an absolute zealot' (IF07). This comment from the School Council focus group interview was apt. It described the determination needed to continue on and keep true to the vision of how things might be, particularly for young people. The role of determination in the perceived success of the reinvention was also commented on by others:

[The first factor in assisting the reinvention process] was [the principal's] determination and subsequently the Leadership and the Strategy Team's determination to move ahead, with the absolute conviction that what you were doing was right. (II03)

'Determination and persistence' (LT19), 'determination and enthusiasm' (LT18) and 'determination of the leaders' (T44) were also mentioned in some staff surveys as a factor assisting the success of the reinvention process, and the principal/researcher reflected on her own 'attitude of gritting your teeth and getting on with things, a determination not to allow things to overwhelm you' (J200411).

The term 'will' is used by Louis and Miles (1990) as one of the five issues involved in getting from knowledge to action in school change. It denotes 'motivation, interest, action orientation, a will to *do* something with the knowledge' (p.289) and implies looking squarely at the school's internal context, living with ambiguity, overcoming fears of loss of control and of the unknown, seeking assistance and resources, and avoiding passivity and denial. Similarly, Collins (2001) refers to the necessity for fierce determination and resolve in his theory of Level 5 leadership.

Fullan (2004) refers to the need for resilience, a blend of flexibility and perseverance. These qualities were evident in so many of the key players in the reinvention process, and in the Leadership Team as a whole, as the dogged determination to pursue the dream continued. Leithwood and Jantzi (1999) maintain that most major school change depends on such high levels of motivation and commitment to solving the substantial problems

associated with implementation. Reinvention processes also assume significant capacity development on the part of individuals and the organisation.

## **Capacity-building**

The reinvention process resulted in significant skill development across the school community, and on several levels.

### **Personal and professional capacity-building**

Parents connected with their daughters' learning and teachers, and with high school education, in new ways; and teachers learned to connect less fearfully with parents (J200411; J200412). The reinvention was aimed at developing new skills and growth in students. In the view of the principal/researcher, the best way of improving student outcomes was through the professional learning of teachers working together in their own school (Darling-Hammond et al., 1998; Ramsey, 2000).

Ongoing professional development, the incorporation of technology into teaching and learning, the work of constructing a new integrated curriculum and 'radical new pedagogy' (Costa & Kallick, 2000b; Wiggins & McTighe, 1998) enhanced pedagogical skills, and many referred to their own growth through the process. For example, some staff members stated:

I feel as though I've learned through the process and I have grown...for me it's been a good experience. (II04)

It's been a great, formative experience for me and I'm sure that...whatever I go on to do next it will be...something that I will build on in my future career. (II08)

I never thought I'd be doing assessment tasks like this. (KI-36; J200207-09)

The school changes people and helps them to grow' (KI-11; J200407).

The skill development thus described fitted into Mitchell and Sackney's (2000) three-level framework for capacity-building - personal, interpersonal and organisational - on the personal level. The training, coaching, giving of supervisory feedback, and teaching of new concepts entailed in the reinvention process fitted into the personal capacity-building level of Louis and Miles' (1990) framework. There was also evidence of interpersonal and organisational capacity-building.

### **Interpersonal and organisational capacity-building**

The ability to tolerate ambiguity, to manage conflict, to communicate and act with appropriate assertiveness (Louis & Miles, 1990, p.292) were examples of EQ skills developed in students, staff and parents through the reinvention process. The

development of these skills enhanced both personal and interpersonal capacity (Mitchell & Sackney, 2000), and addressed some of the needs of girls at the start of the 21<sup>st</sup> century (see Chapter 3). The need to work in groups and teams, and to understand people and group processes, resulted in sociological skill development, further examples of the development of interpersonal capacity through the reinvention process. Efforts were also made to seize unexpected opportunities to learn, such as the outbreak of whooping cough in the boarding school in 2001 (J200105-12), which required all boarders, healthy or otherwise, to be quarantined within the school. This presented the need, and the opportunity, to discuss with students their learning needs in more informal groupings, and to provide different styles of learning, which were much more student-directed. Data were collected from students as a result of this experience, and were used to inform the process of developing the LNSGM (strat plan03; J200303-04; J200207-09).

Methods of consultation and decision-making were refined, an example of improved leadership skills and organisational learning. The 2005 process for determining the new organisational structures (see Chapter 6) involved clear outlining of the background, the ways in which staff opinion and ideas would be sought, and when and by whom the final decision would be made. There were three iterations of the structure, and many processes for communal and individual discussion and input before the final version was determined.

In addition, strategic skills were enhanced through the many opportunities for staff and students to lead, and the need for the school community to have a long-range 'above the line' (strategic) view, combined with 'below the line'<sup>3</sup> (practical) management (J200101-05). Such skills built organisational capacity (Mitchell & Sackney, 2000). Louis and Miles (1990, p.276) describe the work of 'creating new groups for coordination, vision building, doing "rolling planning", and providing assistance', all of which were part of the reinvention process, as building system capacity. The ability to incorporate 'double-loop' (Argyris, 1992a) learning from earlier, successfully-negotiated, whole-school change initiatives, as discussed in Chapter 2, constituted a further aspect of the school's capacity-building at system level. As discussed earlier, previous successful change is a significant factor in successful ongoing change in schools (Louis & Miles, 1990), and built considerable system capacity within the school.

A final example of organisational capacity-building lay in the increasing role played by the school in knowledge sharing within and between schools (Fullan, 2002), as visitors came in increasing numbers. Staff members, including the principal/researcher, were asked to

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<sup>3</sup> 'above the line' and 'below the line' were phrases used by the external strategy facilitator. They became part of the shared language of staff.

present at education conferences and be involved in other forums. 'Leadership of the education community' had been identified as a goal of the 2001-2007 strategy. Realising this goal led to increased confidence and competence within the school community. Capacity-building was also evident in the principal/researcher and Leadership Team.

### **Capacity-building within the principal and school leaders**

By 2004, the principal/researcher and the Leadership Team had developed more refined leadership skills, particularly related to outlining more clearly the processes and locus of decision-making on particular issues, as discussed above. Combined meetings of Leadership Team, and middle managers (both HoDs and HCs), became more frequent, with the focus on solving problems together, not simply enumerating them.

The principal also developed her own capacity for ambiguity and negotiation in relation to union issues. Prior to the reinvention process, in her aspiration to work collegially and create a harmonious community, she considered any breakdown in harmony as a problem. She originally interpreted teachers' union activity as adoption of a conflict-based approach to life and to community. As a result of the reinvention process, however, she came to understand the role of the union and its processes in a different light (Bangs, 2000; Louis, Seppanen, Smylie, & Jones, 2000).

The particular education union to which staff at the school belonged had regularly published information in support of change in schools (for example, D. Campbell, 2000; Hough, 2004; Schutz, 2004; Turbill, 2002), and senior union administrators, while wanting to ensure the support and welfare of their members, were also supportive of the direction of the school (J200304; J200305). Union chapter meetings within the school provided a safe forum for staff to express their fears, although these meetings could also reinforce negative feelings, as one teacher explained:

[I]n a union meeting when people are all talking about what they are unhappy about you can get swept up in this and you find yourself putting up your hand with the others...whereas it would be good to be swept up in the positives (KI-36; J200305).

As a result of the reinvention process, the principal/researcher saw the value in the potential conflict of union activity in providing a further means of identifying potential problems and solutions. As Hargreaves (2003b, p.7) writes, 'professional disagreement [should be] embraced and enjoyed rather than avoided...[and] conflict seen as a necessary part of professional learning, not a fatal act of personal betrayal'. From 2004, union representatives within the school were formally included in think-tanks, such as the Strategy Evaluation Think-tank, and the principal/researcher instigated a termly meeting between staff union representatives and herself, and two other Leadership Team

members. These meetings, conducted in an atmosphere of courtesy and collegiality, enabled issues to be foreshadowed and resolved with little difficulty. Such actions reinforced the view that change involves risk-taking, but that the absolute integrity of the individual and the community must be respected (Diggins, 1997), a core value of the school.

## ***Epilogue***

In 2005, the school community continued to exhibit indicators that it was, indeed, becoming a 'continually reinventing' school. Reflection on the findings of the 2004 evaluation of the first year of implementation of the Loreto Normanhurst Student Growth Model resulted in several changes. Other changes and developments proceeded with less stress than before, as if the school community was becoming accustomed to regular review and adaptation. Among the developments were the following:

1. the amount of time spent in Integrated Learning in Year 7 was reduced from 33 to 25 per cent of timetabled learning time;
2. Integrated Learning programs for Year 7 underwent major changes in order to focus better on student-directed learning and 'radical new pedagogy', and programs were developed for Year 8;
3. increasingly, global events and conditions became part of the authentic curriculum (Gore, 2005; Starratt, 2004b), particularly in Integrated Learning programs, thus increasing student, staff and parent awareness of life beyond school and their own experience;
4. the focus group of Year 7 parents interviewed in 2004 met again in 2005. They expressed strong support for the LNSGM and also made some suggestions for refinement;
5. the program for Stage 5 was developed and was approved as a Board-endorsed course by the New South Wales Board of Studies. Part of this is an Outreach Expedition, which involves Year 9 students, from 2006 onwards, in an extended stay in a remote area, where they will learn with Aboriginal students as well as from the land. This expedition was developed and endorsed as part of the Loreto Normanhurst curriculum, and greeted positively by students, parents and staff;
6. House Coordinators, from 2006, were to become the Advisors for Year 10, an opportunity to know better the future student leaders in their House and assist them in their personal growth and senior course selection processes;
7. structures within the school were found to be inadequate to support both traditional academic and holistic learning approaches. After a lengthy process of consultation and discernment, a new structure was determined (see Appendix 16). Some

existing roles were abolished, some were adapted and new roles added. As discussed earlier, the processes adopted for this consultation and decision process were refined, as a result of earlier learning and capacity-building;

8. the number of opportunities for staff to be involved – as practitioner researchers, members of committees in the new structure, other committees, or Team members for 2006 – continued and expanded. These opportunities were taken up by many volunteers, with less anguish evident within the teaching staff;
9. there was general agreement within the staff that more professional learning was needed on methods of differentiation in both curriculum and pedagogy. This will be the focus for professional learning across the school in 2006.
10. It was noted by several staff members (KI-12; KI-13; KI-16; KI-11), and also by the principal/researcher, that the staff climate had become more positive, and that middle managers, particularly the HoDs team, were exercising considerable leadership. Moreover, a range of key informants from outside the school – several of them former parents of the school - described the extent to which they saw that the school had changed positively and was responding to contemporary needs (KI-01; KI-08; KI-21; KI-26; KI-32; KI-33; KI-34; KI-35; KI-41).
11. In the opinion of some members of the School Council, with extensive experience in education and parent involvement, the school community's understanding of education had expanded beyond a traditional subject-based approach to embrace a holistic, values-based, relational paradigm. Included in a 2005 report to an external body, they wrote:

A major outcome of the processes in developing the new model has been a fundamental and observable shift in the attitudes of staff towards teaching and learning. A collaborative and collegial atmosphere pervades the attitudes and interaction of staff and subject heads. A concentration on subject specifics has given way to the recognition that an integrated learning focus in the early years of secondary school enhances student growth in all curricula and co-curricula areas... A major feature of the student growth model is the engagement of parents in their daughter's learning and outcomes of their schooling. (KI-10; SC43)

This is an important innovatory project in secondary education in which a model for a continually reinventing school has been developed and applied. It has resulted in a thorough-going, whole school revision of curriculum goals, processes and outcomes to make them more in tune with the needs of girls and women for living productive and fulfilling lives in the new century. A "radical new pedagogy" has been embraced which emphasises the self-directed learning of students, individually and in small groups, while placing less emphasis on knowledge transmission by teachers...

The project is one of the most innovative and far reaching that I have encountered. Its success has been built on a lengthy process

involving extensive participation of school stakeholders and discussions about research into social change in Australia, the needs of girls and women in society, and the teaching and learning methods which will best prepare secondary school girls for the changing nature of Australian society and the world into which those students will graduate. (KI-23; SC43)

12. the school's being named as one of the Top 10 Innovative Schools in Australia in *The Australian* newspaper contest in 2004, because it provided external, publicly celebrated, endorsement of the school's work for its students and parents, served to encourage and affirm the school community.
13. In early 2006, the principal/researcher was notified that the school had won a prestigious National Award for Quality Schooling, within the category 'Excellence by School(s) in School Improvement'. This Australian government-funded award will be presented in Parliament House, Canberra in late February 2006. (See <http://www.teachingaustralia.edu.au/home/Awards> for details.)

On the other hand, the draft report of the 2005 evaluation of the Loreto Normanhurst Student Growth Model, while reporting qualitative evidence of student growth in making links in what they were learning, also indicated that there was still some way to go before the innovation was institutionalised, and this is not surprising. The final paragraph of the draft report stated:

The implementation of an innovation with the scope and magnitude of the Loreto Normanhurst Student Growth Model comes not without a significant transition period. While some of the issues and concerns raised in the 2004 evaluation study are still present within the community in some measure, evidence shows that the school has made admirable progress throughout the course of 2005 in the development and implementation of the Model. While the journey is by no means complete, the school must once again be congratulated on its tenacity and commitment to this vision of education. (Mockler et al., 2005, p.21)

## **Conclusion**

In conclusion, the reinvention process, however experienced by stakeholders in the school community, was intended to respond to the changing realities of the 21<sup>st</sup> century, to meet the needs of girls in the 21<sup>st</sup> century Western world - and to incorporate 21<sup>st</sup> century approaches to learning - by developing a continually reinventing culture within the school, yet remaining true to the school's traditional values. The development of many skills and new attitudes were required to build this 'continually reinventing' school, or learning community (Fullan, 2004; Hargreaves, 2003b; MacGilchrist et al., 1997; Mitchell & Sackney, 2000; Mulford & Silins, 2003; Senge, 1990) to this point, and more will be required in the future. The journey is by no means complete, and will never be complete, as continual reinvention implies.

To manage such a cultural change, when everything was changing at once (Meier, 1992; Retallick & Fink, 2002) required special types of leadership from those within the school community. This is the subject of the next chapter, the final findings chapter.

## CHAPTER 8: FINDINGS - LEADERSHIP

The reinvention of Loreto Normanhurst involved drawing from the school's Catholic values and Mary Ward tradition, and 'reculturing' (Gerstner, 2002; Schein, 1992) to meet the needs of girls at the start of the 21<sup>st</sup> century. Leadership was a critical aspect of this task. As Retallick and Fink (2002, p.91-2) argue:

The importance of leadership in an organisation is one of the few ideas in the change literature about which there is fairly consistent agreement (Fullan 1993, 1999, Sammons et al 1995, Stoll and Fink 1996). The major reform movements - school effectiveness, school improvement, restructuring/reform and reculturing - all identify leadership as an important ingredient for educational change (Hargreaves et al 1998).

The final chapter on the findings of this study focuses on leadership and, in answering the question 'What types of leadership were most suitable for the reinvention process?', also addresses the major question of how a school in the Mary Ward tradition could reinvent itself for the needs of a new century. The chapter begins with a review of the leadership frameworks which guided the reinvention. Participant perceptions of leadership of the reinvention process are then discussed, followed by presentation of the findings related to leadership for change which emanated from the reinvention process. The chapter ends with a series of conclusions related to leadership based on these findings.

### ***Leadership frameworks for this study***

Based on the literature on leadership (see Chapter 3), at the outset of the reinvention process, this study was based primarily on three leadership frameworks, which were integrated into the conceptual framework:

1. a combination of values-based leadership (Bhindi & Duignan, 1997; Duignan, 2003; 2004a; Halpern & Lubar, 2003), moral and ethical leadership (Grace, 1995; Sergiovanni, 1992; Starratt, 2004a);
2. theories of leadership based on the modelling of leaders, such as servant leadership (Greenleaf, 1977; 1996) and 'Level 5 leadership' (Collins, 2001b); and
3. shared leadership (Crowther et al., 2002; Duignan, 2004b; Fullan, 2004; Lieberman & Miller, 2004; Riley, 2001b; Sackney & Mitchell, 2001; Starratt, 2003; Telford, 1996).

These approaches to leadership were consistent with a Catholic perspective because of their intrinsic valuing of the dignity of people, their aspiration towards seeking truth and goodness, and their emphasis on leadership as a means to building community (Groome, 1998; Sacred Congregation for Catholic Education, 1977, 1982; The Congregation for

Catholic Education, 1988). Similarly, these approaches to leadership resonated with the Mary Ward tradition, with its belief in the capacity of women, its emphasis on social justice and on relationships generally. (Cameron, 2000; Honner, 1998; Orchard, 1985; Wright, 1997).

Nevertheless, in the course of analysis of data related to this study of a reinvention process, greater emphasis was placed on other leadership theories because of their greater explanatory power, as discussed later in this chapter. The leadership theories which gained more prominence in this study were equally compatible with a Christian leadership perspective. These were:

4. parallel leadership (Crowther et al., 2001a; Crowther et al., 2002); and
5. contextual or situated approaches to leadership, a range of theories which emphasise both the 'situation' (Louis & Riley, 2000), 'context' (MacBeath & MacDonald, 2000) or 'contingency' (C. Day et al., 2001b; Gilley, 1997; West, Jackson, Harris, & Hopkins, 2000) as well as relationships (C. Day et al., 2001a; Louis & Riley, 2000) and values (C. Day et al., 2001a; MacBeath & MacDonald, 2000; West et al., 2000)

The theories outlined in 1) and 2) impact more on the approaches and attitudes of the leader, and were discussed in Chapter 3, yet the findings of this study demonstrated that leadership is more a process of interaction than a role. Such a paradigm is in keeping with a Catholic perspective (Bryk, 1996; Duignan & D'Arbon, 1998; Duncan, 1998; Groome, 1998; Honner, 1998), which understands life as a continual process of growth towards wholeness and holiness.

Leadership understood as process rather than role focuses 'on interaction rather than isolation...favours complexity rather than simplicity...welcomes change and novelty rather than stagnation and conformity [and]...focuses on process rather than product' (Goepfinger, 2002, p.77). Leadership as interaction implies relationship and community (L. M. Degenhardt & Paxton, 1996; Grace, 2002a). As Goepfinger (2002, p.78) argues, '[p]ower does not lie in the attributes of one person: it is the product of an interactive process allowed to reach its potential.' The principal/researcher therefore sought to share leadership with school community members – students, teachers, parents, governors and owners - in 'collective co-ownership of new designs for schooling' (Meier, 1992, p.5). The views of the school community concerning leadership of the reinvention process were therefore integral to this study.

## ***Participant views of leadership of the reinvention process***

Perceptions of the leadership of the reinvention process varied, often depending on the participant's sector and position within the school community. Members of the School Council, parent groups, the Strategy Team, the Strategy Core Team and IBVM respondents expressed general satisfaction with the leadership of the reinvention process. Reference was made by a number of respondents to both leadership processes and roles. The following responses are typical of many others:

The leadership structure here is actually fairly flat in that there's a lot of people making significant decisions...so I think it's a highly successful leadership model. (IF08)

There's a real sense that...I'm not alone, I've got to weave in with other people ...and I think it's incredibly so with this particular process (II06)

The leadership of the principal, and the Leadership Team, was mentioned favourably by many (for example, IF05; IF07; HoD/HC2; HoD/HC5; T43), particularly for the way in which major issues and adversity were handled. The following representative comments illustrate these views:

[The] Leader (Principal) [has the] vision and guts to take on new challenges. (T43)

[The] vision and courage of Principal and Leadership [have been an advantage]. (HoD/HC5)

Students perceived that the reinvention was led by enthusiastic and capable teachers, and the following response was representative of many others

The teachers involved...[have] got a higher level of expertise in their area and they're seen as the best...teachers, the teachers that everyone wants (IF09),

There were also opportunities for student leadership of the reinvention process. These included provision of data on their own experiences of learning, which shaped the reinvention process; running workshops for other students in House groups; conducting focus group interviews with groups of students; and providing regular feedback to the Leadership Team and other groups leading the process.

Concerns mentioned by the above groups included awareness of the challenge of supporting staff through major change (IF06; IF07; IF08), and the perception that students (II07) and parents were not sufficiently involved in leadership of the process (II03). Staff, with some exceptions, generally perceived that the leadership of the reinvention process was inclusive.

In open-ended responses to the questions: 'What have you observed about the leadership of the reinvention process? Who was involved? Was anyone not involved who you

expected to be?' fifty-three per cent of the 107 staff respondents considered the process to have been inclusive, as the following comments indicate:

I think it has been shared leadership and appeared to work well. (S70)

The whole process allowed people to lead in real ways who wouldn't necessarily have had an opportunity to do that and be heard...a very horizontal sort of leadership. (I107)

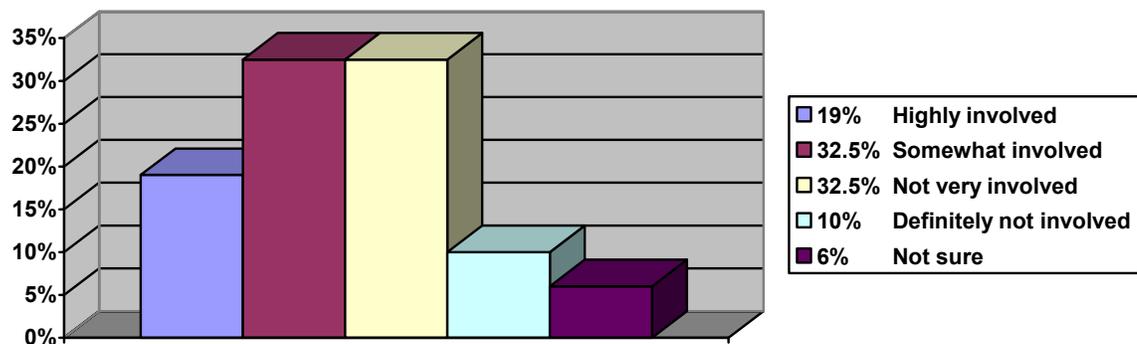
Everyone was invited to be as involved as they wanted to be and those who were MOST committed took ongoing leadership roles (HoD/HC12).

Ten per cent of respondents disagreed that leadership of the process was inclusive, as the following comment illustrates:

I think that teaching staff did not have a lot of input into the proposed changes (T53).

The remaining thirty-seven per cent of respondents did not state an opinion on this issue.

Staff were also asked to name the extent of their own level of involvement in the reinvention process. The responses, summarised in Table 8.1, are compatible with the literature on change within schools (Hord et al., 1987; Loucks-Horsley, 1996), which indicates that people will be spread along a continuum in respect of their willingness to be actively involved in change, as discussed in Chapter 7.



**Table 8.1 Staff self-assessment of own involvement in the reinvention process**

Many opportunities for involvement and shared leadership were offered to all teachers (see Chapter 6), particularly through voluntary membership of a range of task forces and teams, in the attempt to move 'from hierarchies to networking' (Limerick et al., 1998). The enthusiasm of many staff to be part of these groups indicated a willingness to engage in shared leadership and shared responsibility for the reinvention. As one staff member commented:

...each (group) had a little mandate and then they'd pass the mantle on to the next group, and the membership of the next group, apart from a couple

of common people,...was a different profile of person. So in the end with all these groups locking in to one another and building on the experiences that have gone before, you got...an opportunity for a whole range of people to be involved, and I thought that was a fantastic part of the process (IF08).

The strength of such consultation and participation opportunities available to staff were recognised by an external agency when, in 2001, the school was one of only 55 organisations throughout Australia to gain an inaugural EOWA (Equal Opportunity in the Workplace Award). Each year from 2002 to 2006, further EOWA Awards were conferred on the school, largely because of the opportunities for staff involvement, emanating from the school's valuing of the contribution of all and respect for the dignity of the human person.

Staff responses in the school's 2004 formal evaluation of the reinvention not only reinforced the availability of opportunities for consultation and participation but indicated a strong commitment to shared leadership. Ninety per cent of respondents agreed (or strongly agreed) with the statement 'I am committed to supporting the continuing development of the Model' and eighty-two per cent of respondents disagreed with the statement 'I wish that the school could go back to the way it was before the Model came into being' (Mockler et al., 2004, p.23).

There was a growing understanding of leadership as not limited to those who hold formal leadership positions. As one participant stated, '[we are]...trying to infuse that sense of...I lead no matter where I am, and I'm part of it, if I work at this school' (II06). As discussed in Chapter 7, staff commitment, leadership/the principal, and vision were the factors most frequently cited by staff in open-ended responses to the question 'From your point of view, what helped the school to change itself?' Among the ways in which staff commitment was demonstrated was the number of teachers who volunteered to help develop the Loreto Normanhurst Student Growth Model (LNSGM) through membership of one of the sequential or concurrent task forces or teams established.

Yet, as is discussed later in this chapter, there were disadvantages in having a number of such teams. This was just one of several dilemmas associated with leadership for change in a Mary Ward school.

### ***Dilemmas in leadership in a 21st century Mary Ward school***

Twelve dilemmas associated with leadership of the reinvention process were identified in this study, and these are outlined in Table 8.2.

1	Shared leadership: benefits vs drawbacks
2	Delegation vs abdication?
3	Servant leadership vs subservient leadership?
4	Leadership and reculturing
5	Leadership and trust
6	Leadership, middle management and 'contested ground'
7	Sharing leadership with students and parents
8	Values-led leadership: but whose interpretation of the values?
9	The joys vs the cost of leadership
10	Leadership and gender
11	Leadership and generational issues
12	First generation lay leadership in Catholic schools

**Table 8.2 Twelve dilemmas associated with leadership for change in a 21<sup>st</sup> century Mary Ward school**

### **1. Shared leadership**

This was a crucial factor in the reinvention process, and thus is discussed more fully than the remaining dilemmas. The principal/researcher's conception of shared leadership incorporated Anderson's (2004) definition of teacher leadership as 'to set directions and influence others to move in those directions' (p.100), but also included a sense of moral purpose and agency:

While there are vast numbers of outstanding educators, there are also vast numbers of teachers who feel like pawns in someone else's game and who therefore leave the profession or else simply mark time until retirement. The quality of teaching cannot but suffer under these conditions. How then can the quality of teaching be enhanced most effectively? By teachers becoming 're-heartened'. By this I mean the exercise of autonomy, the reclaiming of one's power to make a difference, the restoration of a sense of idealism where it has become lost. (L. M. Degenhardt, 2001)

The strategy process was intended as a vehicle for this claiming of power and expression of idealism, particularly for teachers. Riley (1998, p.112) also writes of the need 'to reinvigorate teachers and create a new spirit of professionalism'. Thus, all stakeholder groups, and especially teachers, were involved in determining the direction of the school and in collaborating to achieve that direction (K. D. Anderson, 2004; Bradford & Cohen, 1998; Fullan, 2004; Fullan & Hargreaves, 1998; Sergiovanni, 2000).

#### **Benefits of shared leadership**

There were many benefits emanating from the shared leadership approach adopted:

1. Shared leadership was in keeping with the school's values of respecting the dignity of individuals (Honner, 1998), of building community (Groome, 1998), and the school's intent of '*...growing individuals and communities...*', and thus provided authenticity to the reinvention process (Duignan, 2004a; Starratt, 2004a). Participants from all stakeholder groups referred to the congruence between the school's values and the inclusiveness of the reinvention process (see Chapters 6 and 7).

2. Involvement in shared leadership developed capacity in individuals and groups through the school community, particularly among staff, as people worked together to determine the school's future direction. As Sr Mary Wright IBVM (1981, p.17) wrote:

If schools are to be able to respond to change, then it is the teachers who need adaptive skills which they too often lack as a result of their training and experience.

Detailed discussion of this capacity-building was provided in Chapter 7.

3. The involvement of staff, parents and students, built commitment to the reinvention, as discussed in Chapters 6 and 7. As Louis and Miles (1990, p.207) claim, imposed change is not usually effective.

4. The wide variety of talents, experience and perspectives among key stakeholders ensured better ideas, discussion and decisions. Retallick and Fink (2002, p.103) claim:

...it is a matter of the team members complementing each other in such a way as to provide the holistic approach to school leadership advocated by the leadership literature...'distributive leadership' yielded more positive results for schools.

Comments by teachers, representative of the views of many, illustrate that this variety was seen as an advantage:

[The leadership of the reinvention process presented a] united front and [was] clearly committed. [Members made] very different contributions – intellectual, organisational, relational (T31); There was a great number of faculties/ areas represented in Leadership to ensure holistic reinvention (T34).

Nevertheless, the proliferation of teams of volunteers had limitations. This difficulty, together with other drawbacks of a shared leadership approach, are addressed in the next section.

### **Drawbacks of shared leadership**

This study revealed several drawbacks associated with a shared leadership approach.

1. Too much involvement can lead to confusion.

While there were many advantages, as detailed above, in the opportunities for involvement offered by the creation of *ad hoc* committees, teams and task forces, the multiplicity of teams became a source of confusion, particularly in 2003 (J200308; HoD/HC15; T24). Some staff members suggested that:

the lines were very blurred at times...[H]aving teams to run everything does blur the line of accountability sometimes, [and] makes it very difficult for the people who are trying to carry it forward, because the chain of command is not clear any more (IF02).

There seem to be too many leaders. It has been a collaborative process, however no one seems to be able to/ willing to make definite decisions pertaining to the process.(T24);

[There are] many layers of leadership...the lines of communication between the layers [are] not always clearly defined (T26)

The paradox was that the very efforts to be transparent and to involve as many stakeholders as possible in the change process led to confusion and some loss of trust, as one staff focus group interview participant explained:

...you think you are in charge and then somebody comes in and says 'well, hang on, this is what this group of people have brought up and this and that', so you [think], well, are we or are we not the people who are doing this?...As a result of that there is a sort of lingering issue of trust I think about how things are in fact decided...what people think, I think, is that somehow they've been... manipulated or something (IF02).

A further example of the confusion related to shared leadership occurred within the Year 7 2004 Team. With some misgivings, the principal/researcher had agreed to this pioneer team being established on a 'first among equals' basis. This led to inefficient meetings, ineffective communication within the team and confusion among the rest of the staff about how to relate to and communicate with the team (J200402; IF01). Team members themselves commented on this (J200402) and welcomed the suggestion that a 'Team manager' be appointed from within the team. Experience validated Yukl's (2002, p.314) assertion that 'It is typical for self-managed teams to have an internal team leader who coordinates team activities'. His description of the external leader of such a team 'as a coach, facilitator, and consultant to the team, [rather than] directly supervis[ing] its work' (p.315) described the role of 'Team Director' taken up by the principal/researcher, as discussed later in this chapter.

2. An innate desire for hierarchy and certainty exists among many teachers (Loader, 1997). Brown and Anfara's (2002, p.38) study refers to 'the walls that commonly exist between most teachers and administrators' and 'how teachers prefer these walls of division to remain'. Some staff felt it was others' job to lead the school and

did not want 'to become involved in making decisions they view[ed] as the manager's responsibility' (Yukl, 2002, p.96).

...the expectation is that we're all leaders in this, but some people find it really hard to be that...[P]eople sort of say...well, you're in charge of it, so you do it (I106).

3. The burden of responsibility that came with involvement in setting and implementing the direction of the school was not always welcomed (I108). Many staff, describing themselves as 'somewhat involved', 'not very involved', or 'definitely not involved' in the reinvention process (see Table 8.1), expressed satisfaction with that level of involvement.
4. The extra work was contentious. Despite the school's provision of release time for teachers working on aspects of the reinvention, there was never enough time. Barlett's (2001, p.190) work on teacher leadership illustrates the difficulty 'for teacher leaders to negotiate reasonable personal and professional lives'.
5. Many teachers wished to focus only on their classroom, rather than whole-school reform, as this comment illustrates: 'It's very often that you hear people saying "I just want to teach"' (J200308). Several other teacher comments referred to the 'injustice' of leaving work for classes in order to work on aspects of the reinvention (Lieberman & Miller, 2004). Little and Bartlett's (2002, p.19) concept of the 'Huberman Paradox' explains teachers' desire to focus on the classroom rather than become involved in whole-school reform. Particularly for experienced, older teachers, involvement in such broader-scale change initiatives is more likely to lead to dissatisfaction, yet, paradoxically, lack of involvement leads to feelings of powerlessness.
6. The potential for conflict was significant. Several staff members referred to the 'polarisation' of staff resulting from the reinvention (J200404), and this is reflected in staff surveys between 2000 and 2002, where a reduction of congeniality and collegiality was reported (see Table 7.3). The level and quality of professional discourse increased (HoD/HC 12; T54), but so too did the level of debate and conflict (for example, J200308). Some staff found this stressful.
7. The necessity of having to reconstruct one's frame of reference. Deep learning is an uncomfortable experience, which some experienced teachers no doubt preferred to avoid (Lather, 1991, ch.7; Valle & Mohs, 1998), particularly when they have succeeded within the existing frame of meaning (Argyris, 1992b) (IF03).

In summary, the notion of shared leadership did not appeal to some staff. Perhaps some preferred to adopt a critical, detached standpoint, blaming others for the inevitable problems associated with a reinvention process. Comparative analysis of staff surveys between 2000-2002, shown in Table 8.3, indicate that appreciation of the school's Leadership Team steadily declined (after 2002, staff and parent surveys were conducted differently, and therefore cannot be compared):

	2000	2001	2002
The Leadership Team is effective	5.08	4.8	4.36
I can speak my mind to members of the Leadership Team		4.47	4.28

(Numbers are means on a 7-point Likert scale)

**Table 8.3: Staff perceptions of the Leadership Team, 2000-2002**

A 'them and us' divide between teachers and Leadership Team widened during the reinvention process. This was noted in February 2004 by staff (IF01, IF02; IF10; II07), as well as by members of the Leadership Team (II01; II06; II08). Reasons given for this included the increase in membership of the Leadership Team, perceived unavailability of Leadership Team members when staff needed/wanted access to them, and the perception that those who did not teach, or taught few classes, were 'removed' from the reality of teachers' experience. Responsibility for any problems was generally attributed to the Leadership Team (IF01; IF02; IF03; IF10):

Leadership and the Leadership Team in particular are seen by some staff as this sort of amorphous thing that does stuff to us...I sometimes think that the actual human side of the leadership in this school is something that gets sacrificed to the big globule leadership thing...especially when people are under duress (IF08).

Goeppinger (2002, p.79) provides an explanation for this situation:

It seems when members of a group are faced with uncertainty and ambiguity regarding direction, they often report experiencing feelings of anxiety, helplessness, discomfort, disappointment, hostility and/or fear of failure. Frightened by these emerging emotions and impulses, members may seek to dispel them through the largely unconscious projection of these feelings onto 'leadership' or the role of the 'leader'...We create a chain of command that often acts as a series of scaffolded scapegoats ready to take the blame. (p.79)

The principal/researcher and Leadership Team addressed these issues by referring to the school's values and processes of discernment, often examining their own individual and group actions (for example, J200303; J200304; J200305) and also attempting to address them in direct discussion with middle manager groups (J200409) and face to face conversations with individuals (Patterson et al., 2002). Theories of authentic leadership (Duignan, 2002; 2004a) and moral or ethical leadership (Sergiovanni, 1992; Starratt,

2004a) directed these efforts, particularly through discussion of shared readings. Yet often the heart of the issue at stake was a matter of accountability.

### **Shared leadership and accountability issues**

The principal/researcher had acknowledged from the start of 2001 that she had no 'blueprint' for the change, but trusted in the wisdom, values and experience of the school community to plan the way forward (for example, ChP072001, Term2). This was welcomed by some, as a member of the Strategy Team stated:

I can never ever pinpoint whose idea it was, you know, who does this idea belong to? And I think that's a real strength of it here in that in fact it does belong to all of us and that it's just not [the principal's] idea or just somebody else's idea. You know we all own it, so you know I guess I'm glad I came to this school (IF08).

However, for others, the idea of shared leadership, and the inability to 'pinpoint whose idea it was', led to suspicion of a 'hidden agenda', as these comments illustrate:

[The process was] going on and on, so in the end you didn't know where it came from, or who had had a say' (IF10).

There was an agenda that was wrapped up in discussion and consensus but ultimately the principal got what she wanted (T58).

There is a part of the staff that thinks this was not a democratic decision...that it was all decided a long time ago, before any team was convened...There's another part would argue that the job of the leadership is to do that, is to decide the vision for the school...then to involve others in moving it forward (IF02).

Louis and Miles (1990, p.195) explain such attitudes:

The paradox is that participation can increase alienation ...by increasing the profound conviction of many...teachers that they are manipulated by administrators who do not understand the circumstances of their work.

Some staff felt that, as the reinvention process developed, and firm decisions on implementation were needed, the opportunities for consultation and involvement diminished (IF10):

There were good people on it [the Implementation Team] and they were representative in the staff, but then the process took over even from them (IF10).

There was an appearance of consensus but near the end it was hijacked (T58).

One member of the Strategy Team provided an explanation for this perception:

I think with regard to the staff it depends on your definition of inclusion and I think that there are probably some people out there who feel that their voice wasn't heard, because the decision which was ultimately made was not the one that they were advocating. (IF08)

Certainly, as the need for increasingly detailed decisions occurred, not all could be discussed and decided by the full staff, which was one of the reasons for establishment of the representative Implementation Team (J200210-12; J200304KI-11). Further, as implementation became imminent, some staff, who earlier may have been apathetic, became anxious to influence outcomes which would affect them. These issues were, in part, manifestations of a lack of clarity in roles and processes.

Another major dilemma associated with the shared leadership approach adopted was confusion between accountability and inclusion, as well as confusion about the role of designated leaders. This confusion, no doubt, emanated from the principal's own initial confusion about shared leadership. Riley (1998, p.117), drawing on the work of Murphy (1994), refers to these issues as dilemmas of self and accountability.

The dilemma of self reflects the struggle that school principals have in trying to get a sense of their emerging role. Principals need to relinquish previous roles but the process of abandonment is not without costs....The accountability dilemma reflects the particular tension for the school principal in trying to involve others in school governance whilst at the same time also being the person who ultimately takes responsibility when things go wrong.

Wilson (2004, p.5) concurs on issues of accountability, arguing that the 'rhetoric is right about the need to work for consensus, to open up inclusive processes, to delegate and to adopt collegial behaviour' but 'when a really tough decision has to be made...that decision will be made by the organisational leader.' Staff expectations that the school was a democracy (IF01; IF02) were, therefore, unrealistic and the principal needed to be clearer herself on the limits of shared leadership.

With ongoing reflection, she moved towards the notion of parallel leadership (Crowther et al., 2001a; Crowther et al., 2002), which combines the need for strategic leadership and the accountability of those in designated leadership roles with that of shared leadership, and also to the framework of values-based contingency leadership (C. Day et al., 2001b; Gilley, 1997; West et al., 2000) in which 'leadership [is] both a highly contextualized and relational construct' (C. Day et al., 2001a, p.40). Values are also of pivotal importance:

...leadership must be courageous, patient, faithful, and committed at its very core of being...Courage gives life to our work as leaders and to the relationships that are so important in workplaces alive with learning, growth, and improvement (Gilley, 1997, p.7).

Throughout the reinvention process, the principal/researcher drew heavily on understandings of leadership associated with the Catholic and Mary Ward tradition (Duignan & D'Arbon, 1998; Grace, 1995; Nouwen, 1989; Sergiovanni, 2000; Starratt,

2004a; Treston, 1997), particularly on aspects related to truth, community and relationships. As is discussed in a later section, this was not entirely either straightforward or simple because of the variety of possible interpretations.

Nevertheless, as the implementation progressed, and the principal/researcher's own understanding of leadership issues evolved, there was greater clarity and better communication about the locus and means of decision-making. Yukl's (2002, p.81) continuum of decision procedures – autocratic decision, consultation, joint decision, delegation – was useful in this clarification. The principal/researcher's adoption of the notion of 'draft decision' on major issues was a helpful innovation for the reinvention process. This phrase denoted a draft solution, which was based on prior consultation and discussion. A series of further opportunities for discussion, discernment and recommendations was announced, in case a potentially better solution or modification might surface, as well as the date of the final decision, which would be made by the Leadership Team.

Overall, the uncertainty about the roles of those in designated leadership positions, referred to above, led to some confusion about the part played by the principal in the reinvention process.

## **2. Delegation vs abdication? The principal's role**

As taskforces and teams were established, led by Leadership Team members and other teacher leaders, the principal/researcher took a more indirect role with staff but remained directly and integrally involved in the process through the Strategy Core Team and Leadership Team. This approach led to three outcomes:

1. While at first interpreted as trust (J200302), some staff saw this degree of delegation as abdication or as the principal/researcher's assigning a higher priority to the study of the reinvention rather than the reinvention itself (I105).
2. Others missed the contribution that the principal/researcher could have offered through more direct involvement:

I expected more involvement and input from the Principal. I felt, if there were any major problems, she would be able to withdraw from responsibility. The Principal would have had, with her experience and research in education, a pivotal and important input (HoD/HC13).
3. The principal/researcher, at some stages in the process, felt disconnected, and struggled to define her role (J200305; J200306; J200402). In fact, as some key informants (200206, KI-22; 200211, KI-23; KI-03) noted, she had 'written herself out of the script' (KI-03; J200306) (Hayes & Flannery, 2000) in her efforts to share

leadership with the school community, to involve stakeholders and to trust the professionalism of staff through delegation. In some ways, she had created a leadership vacuum. The principal/researcher's decision, in February 2004, to become more directly involved was greeted favourably by staff (J200403) and restored the principal/researcher's confidence in her own role.

February 2004, one month into the first year of operation of the LNSGM, was the time of the first implementation dip, as discussed in Chapters 6 and 7. After some deliberation, the principal/researcher made several major decisions: she cancelled her planned leave, deferred her studies, created the position of 'Team Director', and appointed herself to it, so that she could more directly support the Year 7 Team, understand their issues concerning implementation and work more closely with Year 7 students. This was a time when the principal/researcher needed to lead from the front, not from 'the centre of the web of human relationships' (MacBeath & MacDonald, 2000, p.20; Murphy, 1994) or 'from the back of the band' (Leithwood et al., 1992), as the literature on leadership for transformation suggests. In the opinion of some (KI-10; KI-03; KI-13; J200410), these were 'watershed' decisions, which promoted renewed confidence in the LNSGM, greater optimism among the staff, and enhanced trust in the principal/researcher. At the time, these actions just seemed to the principal/researcher to be appropriate. With hindsight, it became apparent to her that they were also invested with symbolic importance in the eyes of staff (KI-03).

Similar uncertainty about roles, and when to intervene, was apparent among members of the Leadership Team. As one member commented:

Probably what we did was hang back and probably what we needed to do was exercise greater leadership...and say, look they're floundering there, or we're giving them too much scope to actually come up with these things, but actually fully resolve them.  
(II06)

At times it seemed to the Leadership Team that some groups were enjoying the opportunity to discuss ideas but without any sense of urgency of the need to make decisions or recommendations (J200308). The adoption of the model of parallel leadership (Crowther, Hann, & McMaster, 2001b; Crowther et al., 2002) resolved much of this confusion, in its confirmation that strategic leadership is the responsibility of those in designated, and accountable, leadership positions.

In her efforts to involve staff and delegate, the principal/researcher had attempted to work from a servant leadership perspective (Greenleaf, 1977; 1996), as befits a Catholic school, and encouraged the Leadership Team to do likewise (II01). Such an approach meant that those in designated leadership positions did not act autocratically or seek personal

aggrandisement but, instead, saw their role as one of service to individuals and to the school community.

### **3. Servant leadership vs subservient leadership?**

As the principal/researcher came to realise, there were difficulties associated with the adoption of servant leadership. Some staff took the efforts of Leadership Team members for granted, and some showed clear disrespect towards them (J200210-12; J200308, for example). Others had inflated expectations of what the school, or the designated leaders, could provide, as the following comment indicates:

Sometimes people expect too much from their leaders...they have this...unrealistic...saviour type mentality, that the leader will come and save [them] from being involved in whatever it is. (IF08)

The conflict seemed to lie in the expectations held by some staff that 'a Catholic community' could meet all their needs (KI-03; J200210-12; J200305) and that 'nobody would ever be upset' (KI-29), whereas the school was also a workplace, and the Leadership Team had to balance the needs of individuals with the needs of the community, especially students and parents (J200308). Such conflicts were addressed by the principal and Leadership Team members being prepared to spend time listening to staff and explaining, both as individuals and in groups. Through these means, they were available to individuals as well as connected to the culture of the school, and particularly to that of the staff.

### **4. Leadership and reculturing**

The effort to change the paradigm of learning, and thereby reinvent the school, revolved around reculturing. Schein (1992) demonstrates the crucial role that leaders play in applying the principles of culture – unfreezing, cognitive restructuring, and refreezing - in order to achieve their organisations' goals. The dilemma in leadership and reculturing at Loreto Normanhurst was twofold: first, the challenge of moving against the natural instinct to preserve the *status quo*, and second, the challenge of addressing the sub-cultures within the school, particularly within the staff (Schein, 1992), as discussed in Chapters 3 and 7.

A comfortable middle-class school can easily be a 'cruising school' (Retallick & Fink, 2002, p.96; Townsend, 2005). One of the challenges at Loreto Normanhurst was to help the staff realise that the school had to address new needs (Stoll & Fink, 1996). Some saw no need for change: 'if it's not broke, why fix it?'(T62). Particularly before 1999, a time of intensive professional development (II08), the principal/researcher perceived that the culture of the school was inward-focused and 'maternal', not unlike the IBM culture as perceived by Gerstner (2002, p.94) at the start of his reinvention of the company.

IBM was a very paternal organisation and provided generously for all forms of employee support. It was a family-oriented, protective environment where equality and sharing were valued over performance-driven differentiation...The old system was not only out of touch with the realities of the marketplace, but it was unable to satisfy the paternalistic underpinnings of the historical IBM culture. Consequently, it made fixing the company very difficult and made employees sad and cynical. We needed a whole new approach - and we needed it fast.

At Loreto Normanhurst, as for IBM, the problems were not simply caused by complacency or a sense of entitlement. Rather, the school, like IBM, had been successful for so long that its people had lost touch with external realities (Gerstner, 2002, p.117) and had perhaps succumbed to the 'arrogance of success' (p.109). The report on the review of the school in 1996 (Keane et al., 1996), discussed in Chapter 2, supported such a view. As Schein (1992, p.321) explains,

If an organization has had a long history of success with certain assumptions about itself and the environment, it is unlikely to want to challenge or re-examine those assumptions. Even if the assumptions are brought to consciousness, the members of the organization are likely to want to hold onto them because they justify the past and are the source of pride and self-esteem.

Just as it was for IBM, where Gerstner considered 'the cultural transformation of IBM's...culture [his] single most critical and difficult task (Gerstner, 2002, p.109), the reculturing of Loreto Normanhurst for the 21<sup>st</sup> century was also challenging. It highlighted, in particular, the sub-cultures within the staff.

Like all large organisations, Loreto Normanhurst had several sub-cultures, some of which were in conflict with each other, compatible with the views of Schein (1992), and discussed in Chapter 3. The challenge and dilemma for the principal/researcher and Leadership Team was to try to align these sub-cultures, not only in pursuit of the school's vision and direction but also to reduce the stress of clashing sub-cultures. As Schein (1996) explains, when organisations attempt to redesign or reinvent themselves, the cultures collide and failure can occur, so enough mutual understanding must be created among the cultures to evolve solutions to which all groups can commit.

The principal/researcher and Leadership Team attempted to find solutions acceptable to all groups through processes of dialogue and involvement:

1. Opportunities were provided for staff to discuss, debate and discern in order to build collegiality (Fullan, 2004). These included expositions, 'post card' exercises, extended 'silent conversations' on butcher's paper, cross-faculty or cross-sectoral small group discussions, the work of the Strategy Evaluation Think-tank and other

*ad hoc* groups established to explore and resolve issues (see Chapters 6 and 7 for details).

2. Opportunities were provided for staff to gather, get to know each other and build a sense of community and congeniality (Fullan & Hargreaves, 1998), including weekly morning tea together, annual *Mind, Body, Spirit* staff reflection day, and regular celebrations.
3. An attitude of care for each staff member (Fullan, 2001; Gilley, 1997; Mitchell & Sackney, 2000) was demonstrated by middle managers and the Leadership Team, who tried constantly to be aware of the needs of staff; especially the weary, the unwell, the unhappy and/or those undergoing difficult times at home. Classes were often taken for those in need of a break, and at times individuals were told to go home or stay home to give them some respite.
4. Opportunities for listening, dialogue, and sometimes challenge, were provided. Members of the Leadership Team and the principal/researcher tried to be available to staff to listen to concerns and discuss these (II01; II06; II08). At times they challenged unsubstantiated opinions offered by longer-serving staff, such as 'the heart of the school is leaving' (J200305).
5. Clear policies and processes were progressively developed, aimed at promoting trust, transparency and confidence among staff. These included employment, appraisal and promotion processes and the collaborative development of policies, such as that related to part-time employment.
6. External benchmarks for measuring performance were emphasised. These included annual parent and Year 12 exit surveys, and the school's academic results.
7. Staff vacancies, and the creation of new roles, enabled people with appropriate skills and attitudes to be appointed to influential positions in the hope of uniting staff sub-cultures behind the school's direction (J200302). At the beginning of the school's reinvention those appointed tended to come from outside the school, an example of 'change by infusion of outsiders' (Schein, 1992, p.304), but, increasingly, internal applicants were appointed, exemplifying 'change through systematic promotion from selected subcultures' (Schein, 1992, p.304).
8. Most importantly, the school's Catholic and Mary Ward values and vision, the IBVM modelling of innovative approaches to education (Wright, 1981), and the staff's genuine concern for the students in their care, provided inspiring focus points for unity.

Despite these efforts, at the end of 2004, conflicting sub-cultures remained within the staff, but the composition had changed. The greatest gap appeared to be between the Year 7

Team members and faculty and House groupings, as the school evaluation report indicated (Mockler et al., 2004).

Overall, the reinvention process caused discomfort to many staff, challenging many assumptions and patterns of behaviour (Argyris, 1992a; Riley, 1998). This impacted on the culture of the staff and also on levels of trust.

## **5. Leadership and trust**

The issue of trust is relevant to this chapter because of the added challenge it presented in the leadership of the reinvention process at Loreto Normanhurst. The principal/researcher's experience was that trust could be expressed through action as well as relationships – delegation and appropriate authority to act (as illustrated in many researcher journal entries). Nevertheless, some staff felt threatened and fearful, as several survey responses, some focus group interviews, and the 1996 review of the school (Keane et al., 1996) revealed.

This fear put pressure on trust levels within the staff, particularly in relation to the principal/researcher and Leadership Team. The perceived dismissal of some staff (Mockler, 2003), the departure of a Leadership Team member because of illness (J200306) (which some perceived was caused by her involvement in the reinvention process), the resignation from the Implementation Team by one member (J200302), and industrial negotiations over the conditions for future Team members (J200305; J200306) added to concerns about trust. In fact, some staff members saw trust issues as hindering the reinvention process, as the following survey comments illustrate:

[There is a] need to develop trust – [to] be transparent in who and what we are/mean.(T12)

[There is] fear and uncertainty and a mistrust of [the] principal. (T58)

It's hard not to be a target of mistrust when engaged in change. Overall, [there is] a sense of collaboration. (HoD/HC17)

Leadership Team members also referred to the difficulty of developing trust (II06; II01; II08). The Team tried hard to build trust within the staff, turning inwards to examine their own actions and develop solutions in Leadership Team meetings (J200305), acknowledging that

trust is something built over time through the personal relationship an administrator is able to establish with each teacher, through always telling the truth, encouraging the sharing of ideas and criticisms, and acting on teacher suggestions (Starratt, 2003, p.189-190).

Building and maintaining trust was critically important in a school whose values rested so profoundly on respecting the dignity of every person, and was committed to **...growing individuals and communities...** In addition, many writers allude to the importance of trust in being able to cope with change and build a learning community (for example, Argyris, 1992a; Fullan, 2001; Gilley, 1997; Mitchell & Sackney, 2000; Patterson et al., 2002). In fact, Yukl (2002, p.274) identifies lack of trust in the people who propose the change as the first item in his list of why people resist change.

The converse of trust, betrayal, was often the result of oversights and mistakes which, while apparently small, can long be remembered by colleagues. The principal/researcher and Leadership Team were guilty of some such 'little betrayals' (Hargreaves, 2003a), despite trying to work and relate with integrity. As Starratt (2001, p.350) notes, 'you are probably, however unwittingly, often doing some harm or hurt to somebody. Be assured that there is always someone in the community who does not appreciate or benefit from your leadership'.

However, an important aspect of a Catholic perspective was to 'provide a variety of ritual processes for reconciliation when they do, and use these opportunities to explore how to prevent future occurrences (Starratt, 2001, p.349). The school's end of year staff celebration of eucharist – when the students had left and the year's work was over for most - was a time of reconciliation for many, if not all, members of staff (for example, J200412).

This was once again beautiful...a strong choir and very moving when we assembled those leaving...to pray our blessing over them. The tradition of passing candles among ourselves continued...it is a good way of people connecting with each other.

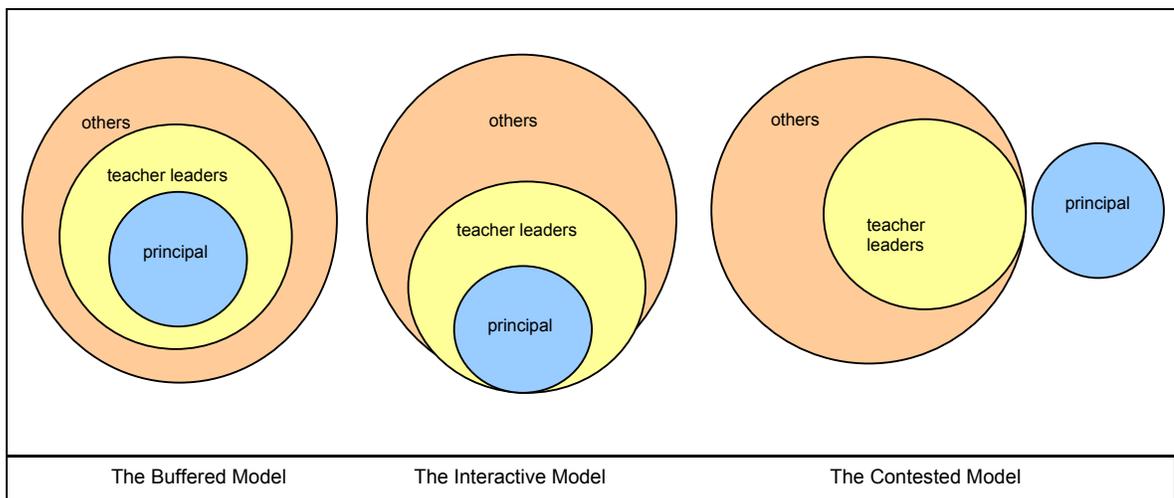
Finally, there were many trust-related issues in the relationship between middle managers and the principal/researcher, together with her Leadership Team.

## **6. Leadership, middle management and 'contested ground'**

The period 2001 – 2004 were times of turbulence for middle managers, that is, House Coordinators (HCs) and Heads of Department (HoDs). The two groups had a grudging respect for each other. HCs prided themselves on the quality of their care for students and the collegial nature of their regular meetings, whereas HoDs prided themselves on the administrative and academic nature of their role. The principal/researcher respected each group. Her view was that both groups needed to appreciate that learning and relationships were equally important, and that each group needed to focus on the whole student, as learner and as person, in an 'academic pastoral care' approach.

Between 1994 and 2004 there was a series of leaders of the HoDs group. Relationships, perhaps not surprisingly, were a challenge. HoDs were often critical of those who led them, and the leaders often found it difficult to work with the group. One expressed 'concerns about leadership of the HoDs group...it feels old-fashioned. When people get into HoDs meetings they put on a different, much more bureaucratic hat' (KI-14). Another admitted that chairing the HoDs meeting was the most stressful part of the week (KI-13).

One difference that the principal/researcher noted, soon after she arrived at the school in 1994, was the way in which some middle managers would publicly challenge the principal and other senior leaders. It was noteworthy in that the principal/researcher had not experienced this in any other school, although it seemed to be part of the culture of this school. Anderson's (2004) framework, depicted in Figure 8.1, would place such interactions within the 'Contested Model' of reciprocal influences between teacher leaders and principals where the principal is 'outside the loop' and stands against teacher leaders in formal leadership roles, who 'seem to have set themselves up as guardians of the established way, setting themselves up in opposition to the principal' (p.110). The principal/researcher's aim was to avoid the 'Buffered Model' and to move towards the 'Interactive Model'.



**Figure 8.1 Anderson's model of leadership reciprocity**

Thus, when the strategy process was developed in 2000, the intention was to involve middle managers as co-leaders with the principal and Leadership Team in setting the future direction of the school. Such attempts at involvement had been noted as early as 1996 (Keane et al., 1996). To this end, the first two staff strategy workshops were organised specifically for HoDs and HCs, deliberately combined in order to break down the 'artificial' separation of these two groups.

The plan to involve middle managers, from the outset, in leading the reinvention was not successful. The first workshop was difficult because constant challenging of both the process and the facilitator was met with abruptness and inflexibility on his part, a significant challenge to the prevailing culture. Although most strategy workshops were very positive experiences, as revealed in the evaluations, these first workshops influenced those that followed, and also shaped staff perceptions of the external facilitator. In the multiple opportunities that followed for staff involvement and leadership, relatively few HoDs volunteered to be involved. Early efforts to involve and include their expertise and experience in a more holistic view of schooling had limited success (J200301; J200307), until late 2003.

Some HoDs (HoD/HC14; HoD/HC16), and some others (IF10), voiced the view that HoDs were left out of the reinvention process, but others felt that HoDs had been included (HoD/HC4; T25) or had the opportunity to have been included. From 2004, however, real progress was made in shared leadership with both the HoDs and HCs groups. This was brought about, partly through the series of combined meetings called to deal with particular issues, and partly by the change in leadership of the HoDs from mid-2003. By the end of 2004, it seemed that the Interactive Model (K. D. Anderson, 2004) of principal-teacher leader interaction was becoming reality.

The literature on school middle managers (M. Brown & Rutherford, 1998; M. Brown, Rutherford, & Boyle, 2000; Busher & Harris, 1999; Little, 1995) provides some insight into why HoDs, in particular, may have felt threatened by the changes involved in the reinvention process. The role of HoD has traditionally been administrative, and subject-focused. As traditional structures became destabilised, particularly with the introduction of Year Teams, conflict arose over responsibility for curriculum. The challenge was to maintain the sharp focus on specific subject disciplines and modes of enquiry and, at the same time, to develop a holistic, student-centred curriculum.

Little's (1995) concept of 'contested ground' was useful in helping to understand how emphasis on the broader aims of education and flexible use of space and time have to be reconciled with bureaucratic controls. It was also useful in understanding how the introduction of new structures, particularly those of Year Teams, introduced new variables in middle management:

1. Many of those most closely involved in the development of the holistic curriculum felt a strong sense of ownership and teamwork, based on their own shared struggles. This took an interesting turn for some, where ownership seemed to be closely held by the

group, rather than on behalf of the whole community, as the following comments illustrate:

...this team worked so very well together, that we...would have seen ourselves leading this enormous change...the element of cynicism you're picking up is really the failure of others to take the time that we took to come up with what we came up with...they've lost the sort of agony that we all went through in formulating those ideas (IF02).

Poor communication from Implementation Team and a 'closed shop' attitude made it difficult for staff to feel what was about to happen. (LT21).

2. Others experienced loss when a temporary role came to an end (II07). Having enjoyed the experience of leadership of a particular phase, these individuals felt a lack of opportunity, and perhaps reduced status (Yukl, 2002, p.274) when they resumed their normal roles.
3. As previously discussed, the Year 7 2004 Team had been set up on a 'first among equals' basis. It became apparent early in 2004 that this was not working well because decision-making became protracted, as no one had the authority to end the discussions and sharing of viewpoints (J200402), and it was also difficult for other members of staff to know whom to contact, so many messages were duplicated or lost. It was, therefore, decided to appoint a 'manager' from within the group as a contact person, as Yukl (2002) recommends.
4. Connections with other groups, such as HoDs, HCs and the Leadership Team, were tenuous, as this was a new structure within the existing organisational structures of the school, and the rest of the school (Years 8-12) were still operating within these. To overcome this disconnect, the principal decided to create a new role – that of Team Director – and undertook this role herself, acting as the 'bridge' between the range of other groups within the school and the Year 7 Team (J200403). Although there were some difficulties in the principal's multiple roles of advocate and employer later in the year when employment conditions were discussed, this combination of internal team leader of a self-managed team and external leader who set the direction, articulated the vision and served as advocate was seen as useful (J200411). Yukl (2002, p.316) maintains this is especially the case 'when there is hostility and distrust by other managers who are afraid the self-managed groups will cause major shifts of power and authority in the organization'.

The discussion thus far has focused on dilemmas associated with leadership of change in relation to staff. Other challenges are now discussed, beginning with the efforts to involve students and parents in the reinvention process.

## **7. Sharing leadership with students and parents**

### **Students**

Efforts were made to enable student participation in the reinvention process. Information on the strategy and the developing LNSGM was provided through assemblies and both Year group and vertical House gatherings, and student input into the reinvention process was by means of strategy workshops, surveys, focus group interviews and feedback from workshops. Selected students were also trained to conduct focus group interviews, and then led such interviews with their peers. Student voice was thus fed into the reinvention process in a number of ways. Overall, however, student involvement and leadership in the process was less than desirable.

There were three main challenges in involving students more fully in the leadership of the reinvention process during the time of this study:

1. Students from Year 7 2003 and above had contributed to the development of a system of which they would not be part. There was concern lest they perceive themselves as 'second-class citizens'. In fact, such resentment did occur (see Chapter 6).
2. Those presenting information to and eliciting the views of students found it difficult to avoid 'teacher jargon' and explain the core ideas simply. Students commented on this (J200105-12), and so too did parents (IF04; IF07).
3. There was concern that teachers would be threatened by the presence and leadership of students throughout the reinvention process. In fact, some student feedback was confronting to teachers (J200207-09).

Students observed that the reinvention was being led by teachers, and very able teachers:

A lot of the teachers involved (have) got a higher level of expertise in their area and they're seen as the best teachers, the teachers that everyone wants...making sure the Year 7s have the best teachers to give it that push off so then other teachers can look at them and ...change (IF09).

This observation goes some way to explaining the resentment expressed by many students in Years 8-12, discussed in Chapter 6; nor would the airing of such views by students have pleased other teachers. Similarly, many efforts were made to involve parents in the shared leadership of the reinvention process, but these also were limited in their success.

### **Parents**

Voluntary strategy workshops for parents tended to attract limited numbers, and sometimes it was difficult even to obtain sufficient numbers for parent focus group interviews

(J200205) (Groundwater-Smith, 2002). (See Chapter 6 for reasons given by parents why this was the case.) In 2002, the principal made an unprecedented call on all parents to attend a strategy information workshop. Nine of these workshops were scheduled over a series of evenings; and parents were individually invited by letter. However, only some sixty per cent of families were represented at one of these, despite follow up letters and phone calls. Parents were, however, involved as co-presenters in parent workshops as well as through membership of the Strategy Team, where they played an active role in meetings and also in directly contacting parents and seeking their views and ideas. Further, the formal parent groups – the Parent Association Executive and the Boarder Parent Committee - contributed to the strategy process through workshops and discussion.

Given that the reason for the reinvention was to cater more effectively for student needs in the 21<sup>st</sup> century, greater input from and more shared leadership with both students and parents would have been preferable. This was expressed by one key informant thus:

I think more parents should have been involved, and more younger people should have been involved...we're in danger of having too many older, more mature, more experienced people (involved in setting the direction)...we come from a different perspective (I103).

Nevertheless, the new LNSGM incorporated significant parent involvement and it also involved students in self-directed, independent and inter-dependent learning. The reaction of both parents and students to these new ways of relating with the school was favourable, particularly by the end of 2004 (J200412). Further, the involvement of parents in this way was in line with the Catholic belief that parents are the first educators of their children (Sacred Congregation for Catholic Education, 1977). The place of values in the new paradigm, and in leadership, was pivotal.

## **8. Values-led leadership: but whose interpretation of the values?**

The greatest strength for the school was its foundation of strong values in the Catholic and Mary Ward tradition. These values offered a source of inspiration for all. The dilemma lay in how these values were interpreted. For example, a leadership decision may have been interpreted as 'unjust' to a staff member but, when viewed from the perspective of students or the whole community, its inherent justice was manifest. As Argyris (1992a) notes, there may be a gap between the 'official' values and those of the 'subterranean' culture, that is, between the theories-in-use and espoused theory

Loreto Normanhurst provided an example of 'culture clash' within the one organisation (Handy, 1996b; Novak & Fine, 1996). There was a variety of interpretations of the school's mission statement and Mary Ward values, the possibility of which Sr Mary Wright IBVM (1981) had raised. In 1998, at the Loreto Leadership conference, she had challenged all

present to understand that these values led to personal and communal challenge, as the tradition evolved.

The important thing is that this tradition is never handed on in a static form, like a baton in a relay race, an inert object to be tightly clutched and relinquished with relief. Because of the interaction of the story with each unique living person, the incarnation, one might say, of the story in each unique living situation, this tradition is always evolving. (Wright, 1998, p.4)

This message was reiterated in 2004 by Sr Margaret Mary Flynn IBVM in challenging staff not to 'sit on the bank of the river' but to be actively engaged in the mission of the school and the Church (J200401).

For some in the Loreto Normanhurst community, the core of these values led to a far from comfortable situation:

I think the reinvention process has seriously challenged us to really engage with the radical heart of the mission of this school. It feels to me like a return to a courageous embrace of a counter-cultural statement and I feel a part of a community which risks 'dangerous' innovations. That is what inspires me to stay - we have faced the needs of our time and tried to be people of vision and action. LT18

[We need to be] innovative, attempting to meet the education needs of women in the 21st century. (HoD/HC3).

Others considered that the reinvention process, and the strategy process in particular, had placed too much emphasis on values and vision instead of practical solutions and decisions (IF10). For others again, the pressure of change on staff, the problems of implementation and the increased focus on accountability were seen as evidence that the school – in particular, the Leadership Team - was not living out its values. Some felt that staff were not being sufficiently cared for, particularly because of the strong focus on students:

Treatment of staff at times shows a lack of respect. At times I have felt that it was more important to value the students rather than the staff. (HoD/HC3)

The dilemma for leadership was twofold: to value each member of the community, perhaps especially those feeling uncomfortable because of the reinvention process, but not to allow these individuals to undermine or 'derail' the direction of the school; and to continue to 'unpack' the essential meanings and application of the school's values so that greater congruence in interpretation could be achieved throughout the school community. One key informant (KI-06), a parent/consultant who worked in the field of organisational strategy, stressed the importance of focusing on values in times of cultural change because 'it allows us to have one foot on solid ground by keeping true to values'. Values were also important for those in designated leadership positions to maintain a balance and accept both the joys and the costs of leadership.

## 9. The joys and the costs of leadership

The Leadership Team worked hard on the reinvention. Debate was generally energetic, and issue-focused. Frequent efforts were made to avoid group-think: these included discussion of shared readings (for example, Levy, 2001; Lovullo & Kahneman, 2003) and adopting a 'devil's advocate' approach to issues. Such an approach was also adopted by the Strategy Team (IF08; J200411). There were times of celebration and exuberance when clarity around an issue was achieved, when conflicts were resolved, when growth and development was observed in students, in staff and in each other, as was documented in researcher journal entries. The Team as a whole took responsibility for the change and, in times of doubt, stress or weakness, particular individuals would reaffirm the direction. The analogy of geese flying in formation, alternating the lead role which bore the brunt of wind resistance, was referred to within the Team (J200207-09) and served to reinforce the sense of team leadership.

Retallick and Fink's (2002) study of four Canadian schools revealed that, in two of the schools studied, the team approach to leadership was successful. This

suggests that the study of leadership should be less about individuals and their leadership styles and more about the overall capacity of leadership teams and their combined strengths and weaknesses....the composition of a leadership team may be as important as the individuals. Simply stated, it is a matter of the team members complementing each other in such a way as to provide the holistic approach to school leadership advocated by the leadership literature...'distributive leadership' yielded more positive results for schools (p.103).

However, as discussed earlier, there were many sub-cultures within the Loreto Normanhurst community, as many writers describe about organisations generally (Hargreaves, 1994; Littleford, 2002; Novak & Fine, 1996; Schein, 1992). The need for constant management of the subterranean cultures (Miles & Huberman, 1994) within the staff, and the politics of change (Riley, 1998), was a major challenge for the Leadership Team, and contributed at times to stress and health-related concerns within members.

Larson (1992) explains one reason why such tensions may exist, and points to the need for greater sociological awareness to support those in leadership roles:

School administrators assume their role with little or no academic knowledge about organisational processes like power, conflict, leadership, communications, and change. Yet they are expected to lead and manage a cadre of professionals who know equally little about these processes and about the social psychology of living and working in an organisation. This is 'institutional illiteracy'.

Handy (1986) also describes how schools have grown into large and complex organisations, yet they still rely on part-time management from busy professionals. The

involvement of the principal/researcher in this study, particularly through her access to a wide range of literature, was of benefit to herself and to the Leadership Team in becoming more knowledgeable about organisational processes, contributed to capacity-building on personal, interpersonal and organisational levels (Mitchell & Sackney, 2000) and therefore enhanced the school's ability to reinvent itself.

To allow for the increasing complexity of school organisation, the Leadership Team, with the approval of the School Council, had gradually been expanded. While some members, for example the Business Manager and Director of Boarding, had no teaching duties, most taught classes, including the principal until the end of 2002. The workload of Leadership Team members was heavy, as they managed their normal duties as well as organising the strategy implementation. As Louis and Miles (1990, p.244) conclude, 'centrally involved people can expect overload.' At the same time, the Leadership Team coped with criticism from teachers, and tried to be available to staff, acting out of a servant leadership model (Greenleaf, 1977). Most members, at some time, referred to the difficulty of doing this:

XX described how people can be nasty, and then say, 'but you're OK with that'. Often she is not, but will claim that it's OK...she's trying to be more honest about her personal reactions now and say to people that it's not OK if it isn't (J200411, KI-13).

We in the Leadership Team try to battle on, without revealing how tired, stressed etc we might be. This can give the impression that we don't feel these things' (J200411, KI-15).

The criticism that was hardest to bear, however, were accusations by staff of failing to live out the values of the school (J200212; IF01; J200305, KI-19), further evidence of how core to the school were its values.

These pressures took their toll. The cost of leadership was high (Lieberman & Miller, 2004; McCormick, 2001), and the sense of responsibility was heavy, particularly at the end of February 2004, as the 'implementation dip' began (J200402; J200403). Although Fullan (2001, p.40) claims that all successful schools experience such dips in performance and confidence as they encounter an innovation that requires new skills and new understandings, most Leadership Team members, and the principal/researcher, struggled as the implementation of the LNSGM began (J200404). Some members spoke of their sense of responsibility (for example, J200309; J200404); most suffered stress-related health problems at some stage in the process; many were dealing with difficult issues in their personal lives at the same time; some considered leaving or actually left the school, one after an apparent 'breakdown'; and there were signs of 'burnout' (see Kremer-Hayon, Faraj, & Wubbels, 2002) in most members at some time.

For a time, especially in 2003 and in early 2004, some rifts occurred within the Leadership Team itself, as people with different personalities and perspectives tried to work together, and alternative interpretations of holistic education were assumed or debated (J200303; J200308/23; J200311; J200402; I108 ). These were observed by, or conveyed to, some staff and were referred to in one focus group interview,

There seems to be a lack of communication between the Leadership Team themselves...we are in the middle of a power struggle (IF01).

Staff survey comments included:

[There are] stressed leaders, confused staff (S85).

The 'load' of the reinvention process on the strategy (sic) team caused a great deal of stress to them and their staff (S84).

Paradoxically, some staff were critical of the heavy workloads borne by the same people they criticised for not being available enough to them. It was a tribute to these Leadership Team members that, despite the difficulties, they kept faith with the vision for schooling discerned through the strategy process, tried hard to remain true to their values in how they addressed the pressures, and kept their sense of humour and collegiality. Reading from the literature on change in organisations helped to sustain a sense of purpose. For example, Gerstner (2002, p.102-6), in writing about the reinvention of IBM, described his own exhaustion and the (often very personalised) resistance he experienced from many throughout the organisation, and how he renewed his energy by focusing on the challenge and the desire to make IBM 'the greatest' once again. In the case of Loreto Normanhurst, the major factor in helping the Leadership Team and the principal/researcher, to keep true in these ways was frequent recourse to the worthiness of the whole educational enterprise, the support of the School Council, particularly the Chair, a prayerful approach, and the inspiration of scripture. The modelling of Mary Ward and other IBVM women, who similarly suffered challenges from within their own communities as well as from external sources (Cameron, 2000; M. Chambers, 1882; Forristal, 1994), was also sustaining. These women provided a feminist insight into leadership and gender, to which this study also contributes.

## **10. Leadership and gender**

The principal/researcher adopted a feminist approach to leadership, as summarised by Limerick, Cunnington et al. (1998, p.134-5), citing Ozga and Walker (1995, p.39). This approach required an explicit commitment to forms of organisation that reflect and value women's strengths; an organisational form that was not hierarchical, but ensured participation; and produced a situation in which there was constant and critical engagement with the possibility that things could be otherwise. The principal/researcher remained convinced of the worth of this approach, as being in keeping with the values of the school

in respecting the views and contributions of others, and as being appropriate for leadership of 21<sup>st</sup> century organisations (Fullan, 1997b; Grace, 1995; Limerick et al., 1998; Schein, 1992). The difficulties encountered could be explained by the cultural change that this meant for the school (Keane et al., 1996) and by the principal/researcher's own need to develop further leadership skills and capacity. A further cause of difficulty could be attributed to gender-based role expectations. Shakeshaft (2000) claims that 'gender identification has a tremendous influence on behaviour, perceptions, and effectiveness' (p.258), influencing interactions in patterns of communication and feedback, and differences in expectations. It is this last aspect that was of particular interest in this study, in three ways.

First, women are less likely to be given negative feedback directly, and therefore are unused to criticism (Shakeshaft et al., 2000). When criticism is given, women tend to take it as an assessment of their personal worth (see also Hayes & Flannery, 2000). This has implications for how leaders can be direct and honest, and how the community can address problems in a forthright manner. It also means that women in leadership roles may lose confidence in the face of criticism. Yet they cannot afford to show this too often because 'emotional rules exist implicit within the educational system and the school itself' (Sachs & Blackmore, 1998). Yet, neither can they appear as too able to cope (J200411, KI-15) and therefore appear invulnerable. Many of these issues were true of the principal/researcher's experience in the course of the reinvention.

Second, men and women define trust differently (Shakeshaft et al., 2000). Men are more likely to define trust as the freedom to say what they want to say, confident that this will not be ridiculed or repeated elsewhere. On the other hand, women expect to discuss conversations, issues and feeling with others. They define trust as being able to rely on a person or group doing 'what they said they would do, when they said they would do it' (p.263). Such varying definitions may shed light on the frequency with which 'trust' issues were raised in this study, as the case study school is highly 'feminised', in that all its students and most of its staff are female. In a continually reinventing school, many things need to be changed or adapted over time, and may cause a loss of trust. Conversely, leaders' unwillingness to promise what they may not be able to deliver could be interpreted as lack of transparency, and also give rise to lack of trust.

Third, staff may expect a female leader to provide a level of nurturing that would not be expected of a male leader. The principal and other female leaders were expected to meet the needs of staff in a wide range of areas (II04; KI-11; KI-16; J200305, KI-19; J200407, KI-16). This phenomenon was raised by other women, one a senior academic (KI-26), who spoke of the dependency of staff on herself as a woman leader and their apparent need for

constant access to her, and the other the CEO of a business organisation (KI-039). The second woman spoke of the dangers of dependency and co-dependency, when staff constantly say, 'who's looking after us?' and of the need to be 'managing the staff, not mothering them. It needs to be a big, happy family without mum' (J200305). It is doubtful that similar expectations would be made of a male leader. Not only gender issues but also generational issues affect leadership.

## **11. Leadership and generational issues**

Among the staff of Loreto Normanhurst four generations were represented. Inherent tensions existed in this situation, caused by the differing priorities and outlooks of each generation. In popular language, a range of labels has been created to describe these different generations: 'the silent generation' (born before 1946), 'baby boomers' (born between 1946 and 1961), 'generation X' (born between 1961 and 1979), and 'generation Y' (born between 1979 and 1994).

There is a growing literature about the different perspectives and values of these generations (M. E. Campbell & Bruneau, 2003; Carr-Gregg, 2004; Mackay, 2004). The silent generation, described as hard working, economically conscientious, with a strong set of moral obligations, are compared with baby boomers, with a strong set of ideals, politically conservative and socially liberal (Department of Translation Studies, 1996). Generation X are perceived as sceptical, questioning of authority, individualist, have a global perspective and feel the need for excitement, whereas generation Y are defined as technologically 'savvy', keen to stay in communication, and with a tendency to 'herd'. Both generations X and Y, having witnessed that the attitudes of their parents' generation to work – notably, loyalty to their company and 'living to work' – were often rewarded by retrenchment and expendability, are more focused on what the employer can offer to them, and better work-life balance (M. E. Campbell & Bruneau, 2003; Carr-Gregg, 2004; Mackay, 2004 ; Markson, 2004).

In the school context, added to these generational issues, is the fact that the supply of teachers is declining and will do so rapidly as teachers from the silent generation and baby boomer generation retire over the next five or ten years (Burke, 2004; Johnson & Kardos, 2005; Konkes, 2001; Lawnham, 2001). Traditionally, young teachers learned from older, more experienced teachers and mastered the craft of teaching. However, some of the more senior staff in the school (members of the silent generation or older baby boomers) reported feeling devalued, even bullied, by younger staff (J200203-04; J200304; J200308). Conversely, some younger staff reported similar experiences (J200207-09). All the above phenomena resulted in the simultaneous need to care for older staff members, members of

the silent generation, who had given long years of service, to offer a steady stream of opportunities and challenges to younger staff members, and to provide flexibility in employment wherever possible for all staff, while not compromising the school's core purpose of the learning and growth of students. Generational issues, and the shortage of teachers, also explained the increasing mobility of teachers, as they took leave for a range of reasons, or sought promotion elsewhere. Teacher mobility appears to be a growing trend among all schools, as evidenced by the growth in employment advertisements and discussion among principals of schools (Burke, 2004).

It was difficult to maintain this balance of often competing needs within staff, and between staff and students. Leadership of this multi-generational organisation involved encouraging staff from all four generational groups to respect and learn from each other. It also meant that leaders needed to be aware of and become adept in strategies for communicating effectively with generations other than their own. Added to these generational challenges, are particular challenges facing leaders who are 'first generation' lay leaders of Catholic schools.

## **12. First generation lay leadership in Catholic schools**

The shift to a lay principal signified major change for Loreto Normanhurst. The arrival of the principal/researcher in 1994 after almost one hundred years of religious leadership was a major change for the school community. Managing community perceptions and expectations put additional pressure on the principal/researcher as a first generation lay principal. These issues are now discussed in the context of the broader Australian Catholic Church.

In Australia, the past twenty years has seen the departure of almost all priests, brothers and nuns (religious) from Catholic schools, including from the position of principal. In 1996, for example, 2.2 per cent of teachers, and 19 per cent of principals in NSW Catholic schools were religious, whereas by 2004 religious accounted for just 0.7 per cent of teachers and 8.7 per cent of principals (Catholic Education Commission, 1996, 2005). The positions the religious filled as leaders of Catholic schools have been taken up by lay people – first generation lay principals. This move from religious to lay leadership has had an impact on Australian Catholic society and culture as well as on the lay principals and leaders in Catholic schools in a number of ways: in the confidence of Church hierarchy, in the expectations of parents and ex-students; and in the staff culture of older-established Catholic schools (Cannon, 2004).

Bishops and religious orders are concerned to ensure that Catholic schools retain their unique religious charism when they are no longer led by religious principals (Putney, 2005) (also, KI-37; KI-38, personal communications, 2005). Loreto Normanhurst, as a congregational Catholic school, while under the religious authority of the local bishop, is under the care of its owners, the Loreto sisters (IBVM). Since the early 1990s, the IBVM set up structures to ensure the continuation of the Mary Ward charism and 'to oversee the values as the schools moved to lay leadership' (2003, KI-26). As one Loreto sister mused, 'the values existed with religious principals but were implicit and undefined and that won't do for today's world' (2003, KI-25).

First generation lay principals, as well as managing all the other challenges of school leadership, must also manage the expectations of parents and ex-students (Cannon, 2004). Many parents of students in Catholic schools were themselves educated by religious in Catholic schools. Some speak, with a range of reactions, of the strict discipline, and the absolute authority of their teachers (IF05; KI-21). The authority of the religious was absolute: no one dared question 'sister' or 'brother'. Religious principals and teachers were expected to be 'always available' - the care and education of young people was expected to be the single focus of their lives - which a celibate lifestyle made more possible. The advent of lay principals of Catholic schools caused many parents, and ex-students of those schools, to be sceptical of how a lay person could fill these expectations, although some identified with a principal who shared some of their experiences of marriage and parenthood. 'The transition from religious to lay leadership has been accomplished, but the paradigm shift in the expectations and attitude of the community and employers to the principalship, that should have accompanied that transition, still needs to be effected' (Cannon, 2004, p.25).

Some aspects of the staff culture at Loreto Normanhurst can be attributed to the transition from a religious to a lay principal. As a consultant who works with many Catholic schools observed, 'there is a culture associated with first generation lay principals. It takes a long time for staff to stop setting things up in anticipation of a punitive culture, where sister/brother would declare the boundaries and say, "this is what we're doing...I'm the boss"' (KI-03). In fact, one staff member, who had previously worked in a school with a religious principal, made the following comment: 'no discussion was entered into...(the principal) would make clear statements!' (J200207-09).

Some key informants, including a Loreto sister, suggested that Catholic schools had not always had a happy culture under the religious as leaders (200303, KI-21; 200305, KI-01) and, as a result, negativity and lack of trust 'had seeped into the bricks and mortar'. This added to the difficulties experienced by the principal/researcher (J200207-09, KI-28;

J200305, KI-28). The Loreto sisters, through the Loreto Schools Advisory Committee (LSAC), attempted in 2002 to assemble recollections of the transition to lay leadership 1970-2000, with each school providing ten contributors. The project did not proceed, quite possibly because not enough time had passed, and individuals would be too closely affected. There are, however, challenges which impact on all principals of Catholic schools.

### **Leadership of Catholic schools**

Grace (1995, ch.9) alludes to the role tension for principals of Catholic schools which emanates from the tension between striving to be a successful school, as judged by external, market-driven criteria, and yet exercising a 'preferential option for the poor'. A further difficulty arises when principals of Catholic schools take action against a staff member who is not performing satisfactorily. Such action, although exercised out of care for students, can be labelled uncaring of staff. Finally, as Grace explains, Catholic teaching on the regulation of sexual behaviour is categorical, whereas there is a much greater degree of ambiguity on social, economic and political matters and so the principal of the Catholic school often looks in vain for Church guidance on social, cultural and professional dilemmas in a postmodern age of liberal individualism (Grace, 1995). By contrast, for many principals of Catholic schools, the opportunity to exercise spiritual leadership of the school community is deeply valued, an opportunity not available to women, in particular, in many other areas of the Catholic Church.

Yet, in analysing a reinvention process such as that at Loreto Normanhurst, it is possible to focus too much on the problems that occurred. It must be remembered that the reinvention process, at the time when this study was written up, was perceived by the key stakeholders to be successful. The final section of this chapter presents some concluding comments about leadership for change.

### ***Leadership for change... some conclusions***

In analysing a reinvention process such as that at Loreto Normanhurst, it is possible to focus too much on the problems that occurred. At the time of writing up this study, the LNSGM had completed a second year of implementation and was yielding obvious benefits for the students and the school community. It was perceived as successful by most key stakeholders and was attracting significant public recognition. Furthermore, the school was increasingly becoming a continually reinventing learning community, as discussed in earlier chapters. There were many learnings about leadership from the processes associated with

the strategy, and the development of a new paradigm of holistic learning and the overall reinvention of the school.

### **A change coordinator?**

To overcome perceived problems in the leadership of the reinvention process, some staff members suggested that a project officer or change coordinator, appointed from within the staff, may have helped (IF01; IF03). With hindsight, this may have been beneficial. Louis and Miles (1990, p.264) suggest that 'good coordination (of a school-wide change program) typically requires both an assigned coordinator and a multi-role steering group'. To provide substantial release time for one person to coordinate activities and communication for all sectors of the community may have taken substantial pressure off the Leadership Team, and increased the transparency of the process, thereby reducing the confusion alluded to by some stakeholders.

### **Reducing confusion**

One means of reducing confusion, especially within the staff, would have been to develop clearer roles for the range of groups, detailing both necessary accountability (J200308) and the limits of their authority, as well as more precise and public 'maps' of how each group was to intersect with other groups. On the other hand, it is difficult to see how this could be done if the school community was 'making the path by walking it', fully involved in a communal development of the vision, the strategy and the new paradigm. This was just one of the paradoxes involved in leadership for change.

### **Managing the paradoxes and dilemmas is at the heart of leadership for change**

Leadership of a reinvention process is a messy business, filled with ambiguity and uncertainty, as is discussed in this chapter and as Goeppinger (2002, p.79) describes:

To understand the process of leadership, one must accept the concept of ambiguity...Many times, successful solutions to problems...require both interaction and messy contemplation. What results from this ongoing enquiry is sustained uncertainty, which is likely to involve some level of discomfort...To let the leadership process happen, uncertainty must be accepted, ambiguity embraced, and active enquiry welcomed.

The construct of parallel leadership (Crowther et al., 2001b; 2002) was found helpful as a model which combined stakeholder involvement with the responsibility and accountability of the principal. Further, no matter how much the leader wishes to empathise and identify with staff, she can never be 'one of us' (Vann, 1999), because she is always ultimately accountable (Wilson, 2004).

Managing the politics (Riley, 1998), building relationships and alliances, as well as managing structure and culture issues, are important for a successful reinvention process. This requires effective communication processes, helping people to cope with change, managing the multiplicity of stakeholder groups and perspectives and remaining always humbly open to new learning.

### **The interconnectedness of learning and humility**

There were a number of learnings from the reinvention process. First, it served to reinforce the Catholic perspective of the goodness of humanity. Although such major change involved ambiguity, uncertainty and hurt for many people in the school community, as this and other chapters have demonstrated, the experience of the principal/researcher was that of appreciation for the commitment and dedication of the members of the Loreto Normanhurst community.

Second, the principal/researcher concluded that specific personal qualities are necessary for the leader of a reinvention process. Chief among these are resilience and passion. Resilience is needed to 'hold' the pain of supporting people as they try to cope with major change. Often the principal/researcher questioned this resilience in herself, but others made observations such as the following:

I don't think the whole thing would have got this far unless we had a leader who would have an open mind, because a lot of leaders I've worked under say they've got an open mind, but in the end they haven't. She definitely has, and she's for it, she must have gone through a lot...the strength of that woman to come through all that...Strength of character and to stick by what she believes...and then even to change...she's just a very strong lady. (IF08)

Resilience also meant accepting that a leader cannot keep all of the people happy all of the time. Many entries in the researcher journal indicated the anguish and sense of personal responsibility of the principal/researcher when school community members were not happy. Ultimately, the reality is that, despite the best efforts of a leader, people have to make their own decisions about their personal orientation and preferences.

From this research, it can be deduced that the leader of a reinvention process must, above all else, have a passion for what s/he is engaged in and represents. It is hard to imagine a more worthwhile lifework than that of supporting young people in their growth, learning and development. The principal/researcher found Collins' (2001) theory of Level 5 leadership, which combines personal humility with 'fierce resolve' when it comes to the needs of the community, an inspiring leadership model to which she could aspire as leader of a reinvention process.

## CHAPTER 9: SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

This chapter provides a summary of the significance of this study. Further, it summarises the findings which answered the research questions, and puts forward recommendations for further study. It also presents the three most significant contributions which this study makes to the literature and to the field of educational leadership theory and practice. These are:

1. a process for reinventing a school, based on the findings of this study;
2. a model of leadership for a reinventing school; and
3. important insights into the role of insider research.

Overall, this study is important for several reasons. First, it documents the journey of a school community which sought to reinvent itself in order to serve its students, parents and the wider society in better and more relevant ways for the world of the 21<sup>st</sup> century. In this process there were challenges of many kinds to be faced, and many of those challenges were within and between individuals. This is an intensive and dynamic case study. It portrays the intensity of the struggles, as well as the sources of inspiration, the hopes, dreams and fears, that occurred within the web of relationships that constitutes a school community. No matter how many models of school change one might study on an academic level, it is only through direct experience that one can really know or understand the complexity and, at times, the ferocity of the process of reinvention. The fact that this study was conducted, analysed and written by a key insider in this reinvention process helps capture some of the intensity of this experience.

Second, several unanticipated outcomes of the reinvention process within the school were experienced and are reported in this study. While the literature on school change is considerable, some of these unanticipated outcomes will add to the information available on major school change.

Third, in light of the findings of this study and reflection on the reinvention of her school, this researcher/principal presents a framework for the process of reinventing a school. This will not only add to the literature, but will provide guidelines and support to other practitioners attempting a similar change.

Fourth, the insider who conducted this study was the principal of the school concerned. The study documents and analyses the challenges of having to juggle the multiple roles of principal, change agent and researcher. At the same time, the principal/researcher had to remain aware of her own essential humanness - her limitations, her reactions, her hurts

and her hopes - in orchestrating the changes in her own school. This study therefore offers insights not often found in the literature of school change and/or leadership of school change.

Fifth, the researcher/principal, as an insider researcher in a position of significant power in the organisation being studied, had to devise methodological means to protect both the participants in the study and also the credibility of the research. The methodological innovations she devised, combined with adoption of the research traditions of autoethnography and transpersonal methods, resulted in a new form of research methodology – PIRM (Powerful Insider Research Method). This may be of use to other insider researchers in positions of power who may wish to conduct research within their own school or organisation. While there are many examples of insider research in the literature (Creswell, 2003; Flick, 1998; Leedy & Ormrod, 2001; Travers, 2001), the challenges and demands of such research when undertaken by a person in a position of power within the organisation are unique, as discussed in Chapters 4 and 5. In this situation, where the researcher is also likely to be the main driving force for change within the organisation being studied, the complexities cannot be overestimated. There are few examples of such insider research in the literature, and a need for research methodologies which address these complexities.

### ***How did a school in the Mary Ward tradition reinvent itself for the 21<sup>st</sup> century?***

To answer the research question ‘How can a school in the Mary Ward tradition reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century?’ required, first, clarification of the vision and values of Mary Ward and of the needs of girls at the start of the 21<sup>st</sup> century. It also required analysis of the extent to which these values were retained and these needs met through the school’s reinvention process. Further, answering the research question required description and analysis of the reinvention process itself, the extent to which it was successful, its impact on stakeholders, identification of factors which either helped or hindered the process, and the types of leadership found to be most effective in the process. These aspects of the study were addressed in detail in the earlier findings chapters.

Figure 9.1 illustrates, in abbreviated form, both the complexity and the interrelatedness of the findings of the study in answering the question ‘How can a Mary Ward school reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century?’ (A complete model of the findings of this study is provided in Appendix 17.)

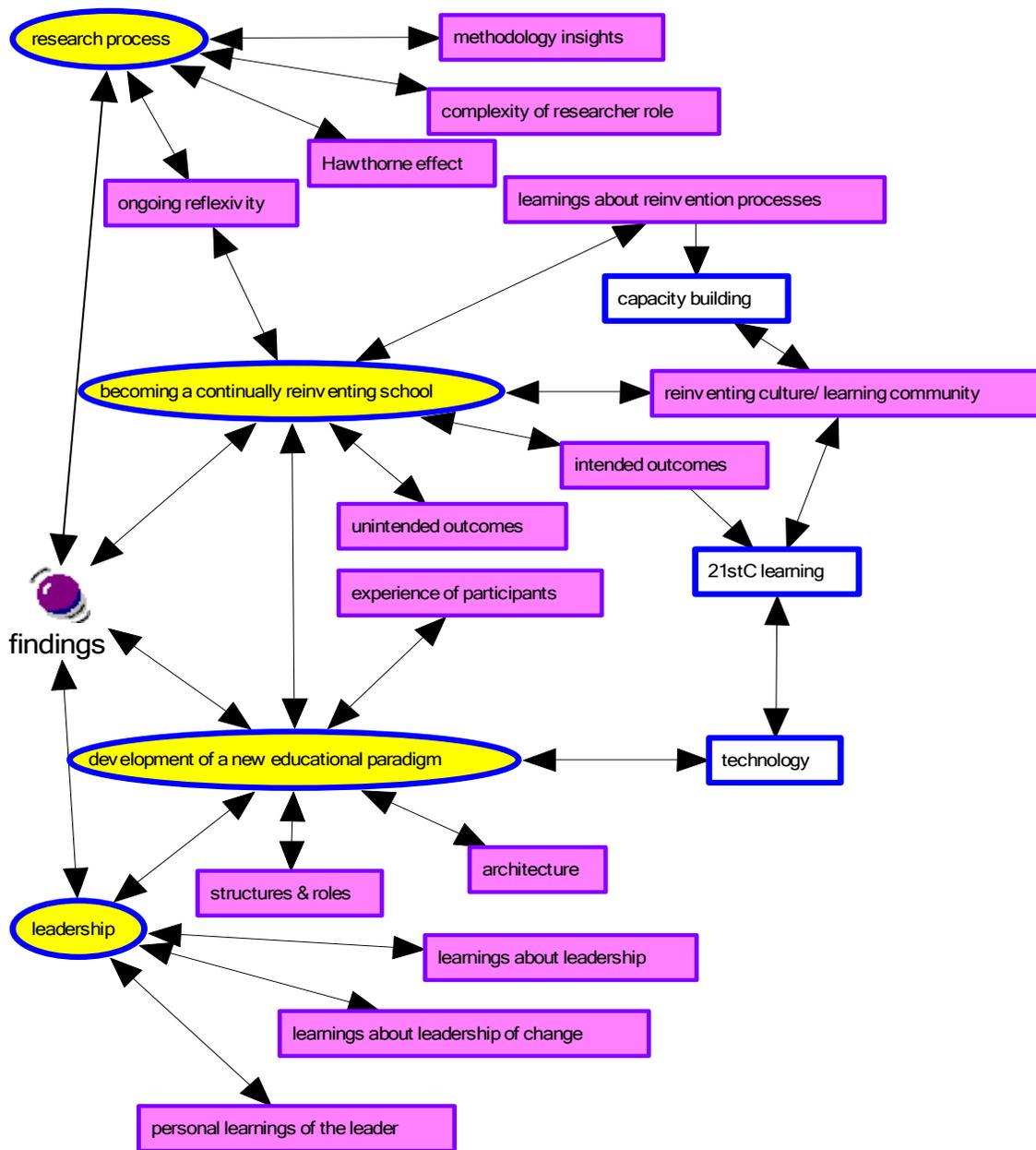


Figure 9.1 Abbreviated model of findings

### ***Intended and unintended outcomes of the reinvention process***

There were many outcomes of the reinvention process, most of which had been anticipated by the researcher/principal, and were intended outcomes of the study. However, the research revealed some unintended outcomes, which had not been anticipated. These were discussed in Chapters 5 to 8, and are summarised in this chapter. Discussion of both

intended and unintended outcomes of the reinvention contributes to answering the research question and several of the sub-questions, namely:

3. What factors assisted the reinvention process?
4. What factors hindered the reinvention process?
5. How was the reinvention process experienced by key stakeholders?
8. What types of leadership were most suitable for the reinvention process?
9. What were the learnings from the reinvention process?

### **Intended outcomes**

Five main outcomes were intended to be achieved through the reinvention process, or anticipated as a result of it. These were:

#### **1. A paradigm shift in the approach to secondary schooling**

Depicted in Figure 9.1 as ‘development of a new educational paradigm’, and discussed in Chapter 6, this intended outcome included the following elements:

- a. the development of a holistic approach to schooling which focused not only on academic learning but also on a range of other areas of human growth. Positive relationships – with self, with others, with the world, and with God, appreciation of the spiritual and transcendent, of the role of sport and leisure, and of the value of and need for contribution to community were further intended outcomes. This whole approach was ultimately called the Loreto Normanhurst Student Growth Model (LNSGM);
- b. identification of, and then meeting, the needs of 21<sup>st</sup> century young women. In particular, this included the need for a sense of personal identity, emotional intelligence and resilience skills, and for positive relationships within a supportive community;
- c. more effective and authentic involvement of parents with the school, especially in their daughters’ learning; and
- d. the adoption of 21<sup>st</sup> century approaches to learning. Summarised as ‘radical new pedagogy’, this was understood to be student-centred, relational, and based on authentic curriculum, which was underpinned by constructivist curriculum theory. It entailed the use of interactive pedagogical methods and authentic assessment, and further development of a range of skills and literacies such as ICT and research skills, and information and critical literacies, together with continued emphasis on the knowledge and skills of traditional academic disciplines.

## **2. Catholic traditions and values**

The reinvention was intended not only to retain and strengthen the school's Catholic and Mary Ward values, but to see in them a catalyst for change. The aim was to bring about a fusion of faith, life and learning in all aspects of school life.

## **3. A future orientation and a continually reinventing culture**

A further intention was to discern the trends into the future and to increase the school community's engagement with the world beyond itself. Through these means, the education provided by the school would be more relevant for the citizens of the future. This outward and future-oriented focus necessitated the development of a 'continually reinventing' school culture, shown in Figure 9.1 as 'becoming a continually reinventing school'. As discussed in Chapter 7, the school needed to become a learning community in its attitude and response to ongoing change.

## **4. Shared leadership and support for members of the school community**

From the outset, the 2001 strategy process was intended to, and did, involve many members of the school community, including all staff. The principal/researcher encouraged a culture of shared leadership and mutual responsibility for the direction of the school, particularly among middle managers, as discussed in Chapter 8. Support was provided for the members of the school community in coping with such major change, and this partly emanated from a sense of commitment to a shared purpose. These aspects were discussed in Chapter 7.

## **5. Impacts on employment and enrolments**

Increased numbers of high calibre applicants sought teaching and leadership positions at the school, as had been anticipated. Nevertheless, using selection processes based solely on merit, it was increasingly internal applicants who were appointed to senior positions within the school, when they were created or became available. This was seen as evidence of capacity-building within the staff.

Some employment mobility had been anticipated: some staff would leave because of the reinvention, either because they were not comfortable with the direction or because the experience would make them eligible for promotion positions elsewhere. These anticipated outcomes were realised.

With regard to enrolments, it had been anticipated that many parents would be nervous about the changes to the school, and that there would need to be much communication, explanation and reassurance. Yet not only were no students withdrawn because of

concern about the Model but increasing numbers of families sought to enrol their daughters because of the school's forward-looking approach to education, explaining this in their enrolment interviews. This last consequence had been hoped for rather than anticipated. There were, however, a number of unanticipated outcomes of the reinvention process.

## **Unanticipated outcomes of the reinvention process**

The unanticipated outcomes identified in this study included:

### **1. Conflict**

While, as previously discussed, the literature warns that change and conflict go hand in hand (Hargreaves, 2003b; Louis & Miles, 1990; Marzano et al., 2005), there was more conflict among staff than the principal/researcher had expected. This included industrial unrest in 2003, heightened 'them and us' positions between teachers and the Leadership Team, the initial resistance of middle managers, especially Heads of Department, conflict between Team members and other teachers in 2004 and, for a time in 2003, the emergence of factions within the Leadership Team itself. With some notable exceptions, the literature on school change is predominantly based on a consensus model, as Louis and Riley (2000) maintain. The principal/researcher underestimated the extent of conflict inherent in such major change.

### **2. Boundaries and definitions**

The difficulty of defining and creating boundaries around what was understood by 'holistic education' was another unanticipated outcome. At times within the school community there was a confusion between a holistic approach to learning (Forbes, 2003; Wright, 1981) and integrated curriculum, which simply combines academic disciplines. At other times there was an overemphasis on the academic, especially information literacy skills, and a need to keep the other Faith-Academic-Community-Extracurricular (FACE) elements, particularly the Faith dimension, included and articulated. The extent to which holistic education was, and probably needed to be, an emergent understanding within the whole school community had been unanticipated.

### **3. Resistance**

The extent of the resistance among some staff to the reinvention, once it moved beyond talking and planning into action, was unanticipated, although it is addressed in the literature (Corner, 2000; Reynolds & Packer, 1992; Sizer, 1992). Some perceived holistic education as a threat to traditional academic disciplines (Little, 1995), partly because of the loss of some teaching time to accommodate the Integrated Learning program; others believed that

their own way of teaching would continue unchanged; some expressed fears about students' ongoing academic success in external examinations; some feared for their jobs, despite continual reassurance that the new approach would, and did, create more positions.

#### **4. The role of middle managers**

It had been expected that the school's middle managers - Heads of Department (HoDs) and House Coordinators (HCs) – would play major roles in supporting the strategy direction and in developing the details of the LNSGM. As discussed in Chapters 6 and 7, this did not happen as anticipated. Other staff members ended up assuming key roles in the work of development, and there was a sense of resentment on the part of HoDs. Continued efforts at empathic communication, particularly between middle managers and the Leadership Team, including the principal, resulted in better mutual understanding of concerns, hopes and fears. The school's middle managers, especially HoDs, ultimately became proactive drivers of the new Model, and exercised significant leadership within the school, especially from late 2004. With hindsight, it can be seen that it was no doubt inevitable that a time of conflict, difficulty and misunderstanding would occur when such major change was underway (Busher & Harris, 1999; Harvey, 2000; Little, 1995). Such change redefined the roles of everyone in the school community (see Figure 9.2), including middle managers. The cognitive restructuring (Schein, 1992) necessary to do this is usually painful and confusing, especially as everything seems to be changing at once.

#### **5. The ripple effect**

What became apparent during the course of the reinvention process was the extent to which every element and relationship impacted on every other. Changing or modifying even a relatively small aspect of the school had multiple effects. For example, the establishment of Year Teams created some structural confusion and destabilisation of how people had become accustomed to relating to each other. The design and creation of flexible learning spaces gave rise to further change and disruption as people were physically relocated. Often, the physical dislocation seemed symbolic of dislocation on many other levels (Bridges, 1995). This 'ripple effect' is characteristic of holistic change. It is also understandable when viewed from an organic, living system, 'lifeworld' paradigm of school (Sergiovanni, 2000).

#### **6. The impact of the research on the reinvention**

The impact of this research on the reinvention it sought to study was a major unanticipated outcome (Heron, 1996), and Chapter 5 is devoted to this issue. On the one hand, there were undeniable benefits for the school community, and the principal, in the discipline of

careful recording of processes, of constant analysis of what was happening as the reinvention processes continued and evolved, and in the access to and application of the wide range of literature that a formal study entails. On the other hand, there were significant dangers in the reinvention process being researched as it progressed, particularly when the researcher was also the principal and change leader (Delyser, 2001; Smyth & Holian, 1999). It was a high-risk study, just as the reinvention process was a high-risk change. While it was appreciated from the outset that risk was involved, the full extent of the risk was unanticipated but became increasingly apparent to the researcher/principal in the course of the study.

### **7. The role of the principal**

As discussed in both Chapters 5 and 8, the role of the principal was central to the reinvention, more central than the principal/researcher had realised or anticipated, in her concern to adopt a shared leadership approach. One measure of the school community's perception of the centrality of the role of principal was concern that the principal might leave. Despite her public undertakings to staff that she intended to remain at the school to see the strategy (see Appendix 15) through to completion, concern lest the principal leave the school before the reinvention was institutionalised was expressed by some staff, parents and other community members.

A major unanticipated impact of the reinvention was the extent of the principal/researcher's own learnings, especially about leadership for change (Braud & Anderson, 1998). Her awareness and use of new methods of involving staff in discernment and decision-making, and her views of leadership theory both evolved. The study of the reinvention also developed her, as researcher/principal, in her understanding of research processes. She was herself involved in deep learning and stretched, at times, to what felt like breaking-point (Valle & Mohs, 1998).

The most difficult times in the reinvention process were those when there was little clarity, when there was conflict among staff, and when the principal/researcher was the target of mistrust and cynicism, as Marzano (2005) details. Particularly in 2002 and 2003, it was not clear how the vision of holistic education that had been developed could be turned into a workable system, given the complexity of high schools as organisations, and particularly when there were so many externally-imposed constraints, as discussed in Chapter 2. The sense of fear, doubt and responsibility were palpable at these times. Moreover, the principal/researcher had to deal with the negativity generated by the reinvention, and the research on the reinvention, within some members of the school community. This was sometimes exhibited in personal attack or by attributing selfish motives to the

principal/researcher. There were also difficult times in the conduct of this study when, as no doubt many researchers experience, there seemed to be little clarity and the task felt overwhelming. Hence, in both the reinvention and the study of the reinvention, there were many difficult and/or challenging times.

However, there were many exciting times in both the reinvention process and in this study. The ‘flow’ experience of deep learning, the (often black) humour shared with colleagues who were equally passionate about how the LNSGM would benefit young people and their learning and growth, the sense of being committed to something far greater than oneself, with the potential to benefit many people, all contributed to inspire and sustain participants. There were many moments of exhilaration when breakthroughs in understanding were made – personally, or when working with a group of adults, but particularly when working with students and it was obvious that they were engaged, questioning, thinking deeply and really enjoying the process.

### Impacts of the reinvention on every aspect of school life

Overall, the process of reinvention impacted on every aspect of school life, as outlined in Chapters 6, 7 and 8, and illustrated in Figure 9.2. Concrete changes were evident, such as changes in architecture, in role descriptions and organisational structures, in financial plans and annual budgets, in technological innovations, hardware and software, and in programs, learning tasks and assessment methods.

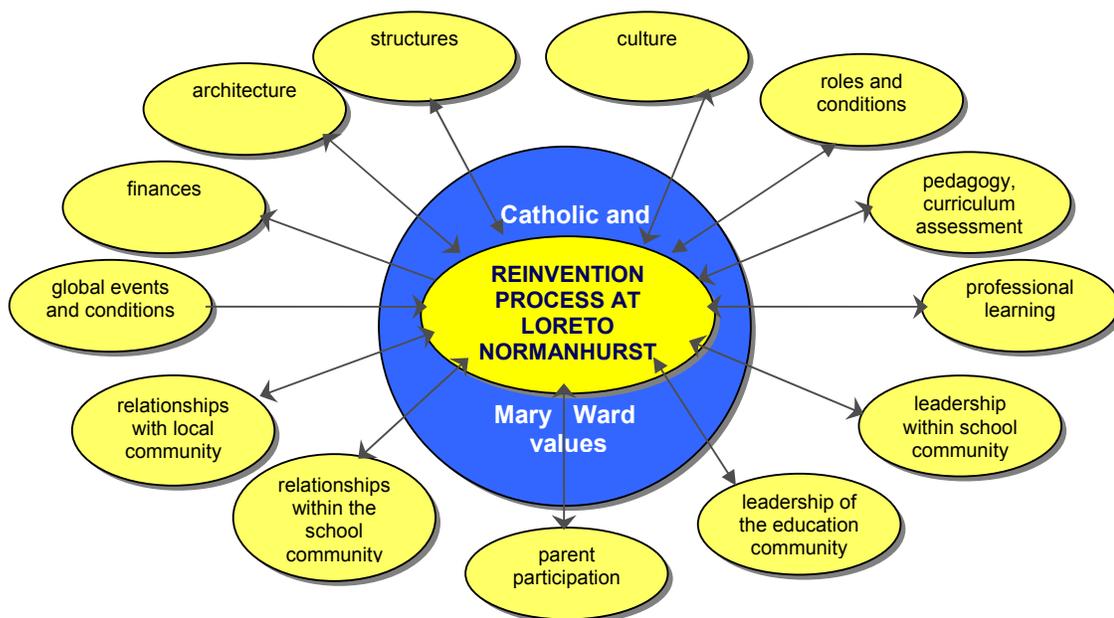


Figure 9.2 Impacts of the reinvention on the school

However, the most important changes within the school were intangible. Changes in the attitudes and outlooks of those within the school community, such as increased tolerance of ambiguity; greater trust; a willingness to share, leading to teaching becoming a public rather than a private activity; more teamwork; increased professional discourse - all provided evidence of a cultural shift within the school community.

### **Cultural shift**

The major changes were thus cultural: in the way in which teachers had expanded their understanding beyond a traditional subject-based approach, and in that most parents appreciated the new paradigm, despite its difference from what they themselves had experienced at school and what other local schools were offering. The central group within the school – students – also exhibited signs of change. Students in Years 7 and 8 became confident thinkers and problem-solvers, and took more active responsibility for their learning, as discussed in Chapter 6. Their teachers and parents identified them as qualitatively different learners than the older students in the school.

By the end of 2005, the school was well on its way to embracing a holistic, skills-based paradigm which, as well as valuing traditional subject disciplines, also fostered the development of self-awareness and community, and integrated faith perspectives into every aspect of school life. Reference to the FACE elements, as discussed in Chapter 6, was a normal part of the shared language of parents, students and staff within the school community. Further, it had become commonplace for any activity to be questioned in light of how it contributed, or could contribute, to the FACE elements. The active involvement of parents in the education of their daughters, and the development of a shared language of metacognition were further examples of the less tangible impacts of the reinvention process. Others included the capacity-building that was evident within individuals, and also on inter-personal and organisational levels.

### **Capacity-building within the school**

This capacity-building was enhanced by the increased professional learning opportunities and the increased levels of shared leadership opportunities offered and taken up, particularly by staff. This, in turn, contributed to changes in traditional, hierarchical, understanding of concepts of leadership.

Examples of this capacity-building resulted from the creation of specific-purpose groups, such as the Strategy Team, the Implementation Team and the task-forces which preceded it, the Strategy Evaluation Think-tank, FACE Committee, the Stage Holistic Program Committees, and the Reporting Review Committee (see Glossary). These groups enabled

volunteer staff (and some parents) to develop new insights into and contribute to the emerging paradigm, greater awareness of the challenges involved in managing people and ideas, and enhanced ability to deal with both ambiguity and conflict. Members of the Year Teams, and other teachers, developed a wide repertoire of skills in curriculum theory, design and delivery. They developed other skills also, through interacting professionally and personally with a much wider range of other adults, particularly within their own Team and faculty, and with parents, than is usual for teachers in a traditional paradigm. Further, it became increasingly the norm for groups to be led by teachers outside formal leadership positions, even if senior leaders were members of the group.

### **Impacts beyond the school**

Other impacts extended beyond the school. Loreto Normanhurst staff became increasingly involved in leadership of the education community, as foreshadowed in the 2001 strategy matrix (see Appendix 15), hosting visitors from many schools, education offices, and universities, local, national and international, and presenting papers and workshops at conferences. The school's successful reinvention began to be acknowledged in the media, and particularly by winning a prestigious National Award for Quality Schooling. This activity and acknowledgement, in turn, built further capacity and confidence within individuals and the community.

### **The role of the school's values**

The school's values were the catalyst, the inspiration and guidelines for the reinvention process. Hence, in Figure 9.2, they are represented as the medium through which all other changes in the school were filtered. While the school's Mary Ward tradition and values had always been espoused, the theory-in-use was becoming more aligned with those espoused values (Argyris, 1992a). The Year 7 and 8 advisors, in particular, illustrated this: these teachers' efforts to construct the Integrated Learning programs, and the student-advisor conversations they conducted with each of the students in their care, reinforced the holistic, growth-based nature of the new paradigm, including the spiritual dimension, of which they became increasingly aware and comfortable in discussing. Such a change can be understood within Schein's (1992) unfreezing, cognitive restructuring, refreezing framework.

Over the five years, 2001-2005, the school community had moved through the 'unfreezing' process of having to confront disconfirming data, and come to terms with the fact that the traditional education the school had offered was no longer adequate to meet the needs of the 21<sup>st</sup> century young women in its care. The painful years of working out together how to meet those needs in a new educational paradigm, while always keeping the school's

values central, was a time of 'cognitive restructuring'. Such deep learning is always uncomfortable and confusing, because the mental models (Handal, 2003; Senge, 2002) through which beliefs and practice are filtered, are themselves under question. Bridges' (1995) theory of the journey of psychological transition was thus confirmed by what happened within the school. The school was undergoing disjunctive change (Cuban, 1988): people were being asked to do what they had never done before. Finally, as the new patterns and understandings emerged, and a new language developed to express them, the school community moved into the 'refreezing' stage, where the new paradigm was reinforced and started to be institutionalised. The commitment to continual evaluation should enable the school community to institutionalise an ongoing openness to innovation and change (Schein, 1992).

Many learnings and conclusions about the reinvention of a school and about approaches to leadership of a reinventing school can be articulated as a result of this study. There is too little literature on school change written from an insider's perspective, but also adopting an *etic* perspective. In particular, little research on such large scale holistic change has been undertaken by practising principals. Other practitioners, particularly other principals, attempting such an undertaking may therefore benefit from this study. It adds to the literature on change in schools, and leadership for such change, in three ways, which are now discussed.

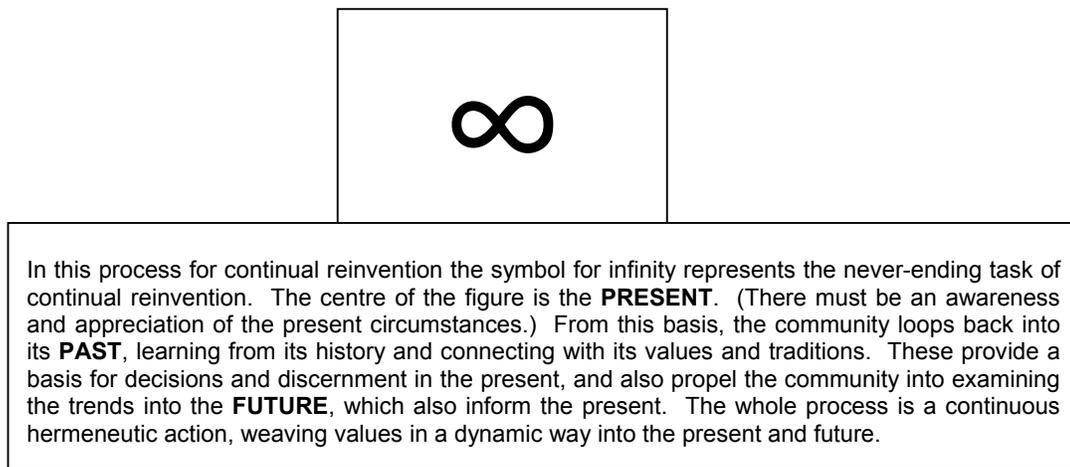
### ***Key learnings and conclusions of this study***

This study makes important contributions to the fields of school change, educational leadership, and insider research methodology. First, it offers a framework for the reinvention of a school and the development of a culture of continual reinvention. Second, it proposes a model of leadership for such a reinvention. Third, it presents a more fully developed method for conducting insider research by those in a context of power, which may be used by principals and others in positions of authority.

### **A framework for reinventing a school**

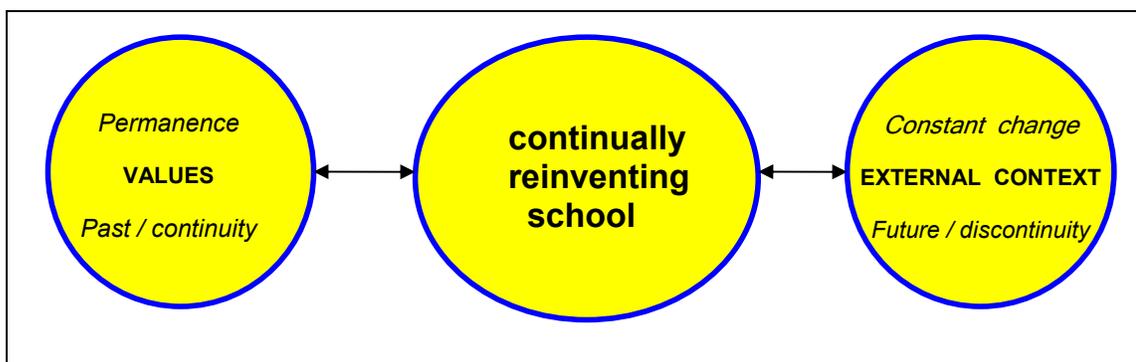
The world of the 21<sup>st</sup> century presents complex issues and demands complex coping mechanisms. Profound and systematic change is required to meet the needs of these times (Zmuda, Kuklis, & Kline, 2004). This study presents a framework for such change in schools. It consists of a central dynamic which constantly weaves between the school community's values and engagement with the external context. This dynamic, represented by the symbol for infinity ( $\infty$ ), ensures a continual engagement with the external world beyond the school as well as a constant platform and boundaries which inspire change but

also limit the possibilities of change to the agreed direction. In fact, one of the problems of school education is that there is so much change, without a clear paradigm or direction to guide it. Consequently, some of the changes made are inconsistent, as people of good will attempt to do their best for young people and their learning (Marzano et al., 2005). Through the dynamic of  $\infty$ , the past and the future are simultaneously incorporated into the present-day world of the school community, as presented earlier in Figure 3.3.



**Figure 3.3 Weaving infinity: a hermeneutic approach to reinvention**

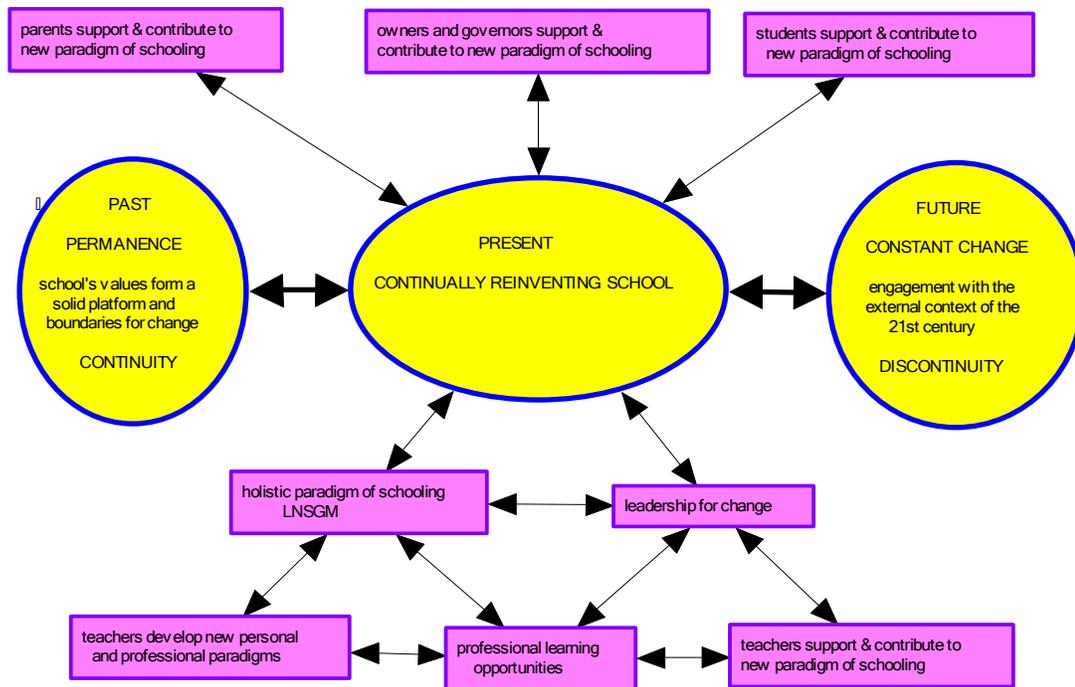
Figure 9.3 presents an alternative version of the same dynamic interaction between values and context.



**Figure 9.3 The dynamic interaction of values and the external context in a continually reinventing school**

By contrast, Figure 9.4 is an expanded version, illustrating how other important aspects impact on or are impacted by this dynamic of continual reinvention, and constitutes a conceptualisation of the findings of this study. These other important aspects are concerned with the development among teachers of new mental constructs about schooling and their own role relative to students, parents and the curriculum, the education

and involvement of parents and students, and new forms of leadership appropriate for second order change (Cuban, 1988; Marzano et al., 2005; Mitchell & Sackney, 2000), discussed in the following section.



**Figure 9.4 Conceptualisation of findings**

The first major contribution of this study thus comprises a framework for reinvention of a school. This framework has been developed from the findings and is based on establishing a continual dynamic between the school community's values and engagement with the external context – local, national and global – in which the school operates. It incorporates the following eight steps:

1. identification of the school community's core values;
2. engagement with the external context and the needs of the future;
3. using this dynamic, development of a vision for meeting the needs of its students;
4. conversion of this vision into a new paradigm for learning and growth;
5. use of inclusive processes to ensure that key stakeholder groups support and contribute to the new paradigm;
6. management of change problems and micropolitics;
7. provision of professional development and support to assist teachers to develop new personal and professional paradigms; and
8. identification and adoption of appropriate models of leadership for second-order change.

While such a list is useful, it must be remembered that these steps will not necessarily be followed in a linear fashion. Often they will be covered in different order, or simultaneously.

### **Step 1: Identification of the school community's core values**

This step is pivotal. Unless there is at least general agreement within a school community on what its members see as important, there is little likelihood of the school avoiding the danger of piecemeal or random changes which lack coherence and over-riding purpose. Piecemeal change can lead to exhaustion and the risk of arbitrary reversal of changes implemented. An agreed set of core values provides a school community with the stability of a solid platform or anchor in times of great instability. From this platform, there can be a confidence which provides boundaries and focus to change within the school. Further, the process of a school community discerning its shared values together, in itself, builds capacity for change and for collaborative work on reinvention. All school communities have values, whether tacit or articulated. The process of identifying and naming these values, even in secular schools, is not only possible (Kessler, 2000), but necessary. The values base provides a strong platform from which changes can be built and a benchmark against which decisions can be made. In fact, a strong values base provides the reassurance of some certainty when there is no prototype for the future, and a safety net when it feels 'like being between trapezes [and] there's nothing to hang onto', as described in Chapter 6.

### **Step 2: Engagement with the external context and the needs for the future**

Members of school communities are part of the wider community and global society. They therefore bring into the school a range of issues and perspectives which will affect how the school needs to develop. The world beyond the school, as discussed in Chapters 1, 2 and 3, is constantly changing, and therefore schools need to provide students with the knowledge and skills necessary for this changing world. The process of engaging with the external context, if carried out in an inclusive manner within the school community, enables members to reflect on the ultimate purpose of education from within their values framework. This will ensure that the education offered by the school is relevant for the people, the place and the times. Such a process assists parents and teachers, in particular, to realise that education for the 21<sup>st</sup> century needs to be different from that which they experienced themselves. They can then begin to formulate the education that the school needs to offer its members.

### **Step 3: Development of a vision and model for meeting the needs of students**

The first two steps adopt a systems approach to the reinvention. A systems approach also needs to apply in the development of the vision for the future, through a process of:

1. deriving a set of principles to underpin the changes to the school. These principles provide both boundaries and a check-list against which draft models for change can be evaluated;
2. encouraging the development of a range of alternative models to meet future needs within the agreed values framework;
3. establishing methods of public critique of these draft models;
4. deciding on a preferred model, which may incorporate aspects of several of the draft models;
5. evaluating transparently and regularly during the development, implementation and institutionalisation phases.

The next step develops the vision and refined model into a new paradigm.

#### **Step 4: Development of a new paradigm for learning and growth**

It takes time for these understandings to evolve gradually from a more intuitive to a conceptual awareness, which can be visually depicted and verbally described as a new paradigm. It is important for those within the community, as well as those outside it, to understand how the values, the vision, the model and any structural changes all fit together. Painting a picture is necessary because people need to 'see' how it works and where they fit, as Bridges (1995) claims. All of the elements of a systems approach, as described above, will involve a wide range of key stakeholders.

#### **Step 5: Use of inclusive processes**

There are compelling reasons why inclusive processes, involving all stakeholder groups, should be used in a reinvention process, and this research confirmed them. First, the school will obtain a wide range of ideas and perspectives, since those in formal leadership positions have no monopoly on creativity and breadth of perspective. The ideas and views of students, parents, governors and owners, and especially those of staff, all contribute to a balanced and well-informed perspective on current realities, on future trends, on the needs of the school community and on desired futures for the school.

Second, the inclusion of stakeholders in the processes of discernment, as well as the development and implementation of plans for the school is likely to bring about greater community ownership of the school and its direction for the future. The power of a sense of ownership and pride within a school community is a factor which cannot be overestimated in bringing about desired changes. Attitudes often determine outcomes. Nevertheless, inclusive processes can also mean that differing opinions and priorities need to be managed.

### **Step 6: Management of change: problems and micropolitics**

Problems need to become 'friends' (Fullan, 1998a) and not a source of blame. Some people in the school community will never be happy with the changes and can undermine the process. Yet, by remaining open to criticism and critique during the reinvention process, several outcomes are brought about:

1. better ideas and/or solutions may be presented by critics;
2. problems which might 'derail' the reinvention can be named and anticipated;
3. dissent does not go 'underground' and form resistance, causing further problems; and
4. a transparent process means that everyone can have a part in it without fear. This is perhaps particularly important for those teachers who fear change lest their competence be questioned in their own eyes or in those of others. This sense of vulnerability can be assuaged by the school's providing professional development opportunities and personal and professional support.

### **Step 7: Professional development and support to help teachers with change**

Professional learning plays a major role in helping teachers, on a personal level, to cope with change in schools, and to change their own professional practice. In this way, student learning is enhanced. The findings of this study, supported by the literature (Griffin, 1987; Keane, 1987; van Manen, 1991), suggest that the best professional learning is that which:

1. respects adult learners and the skills and experience they bring to the learning process;
2. emanates from their own questions and perceived needs;
3. is interactive and reflexive rather than prescriptive;
4. challenges people's thinking and mindsets;
5. builds in the opportunity for reflection; and
6. provides support and safety for learners to assimilate their new learnings into new mental constructs.

Without the provision of such professional learning experiences, and the time in which to take advantage of them, the success of a reinvention process is problematic. The same need for professional learning applies to the principal and senior leaders in the school.

### **Step 8: Identification and adoption of models of leadership appropriate for second-order change**

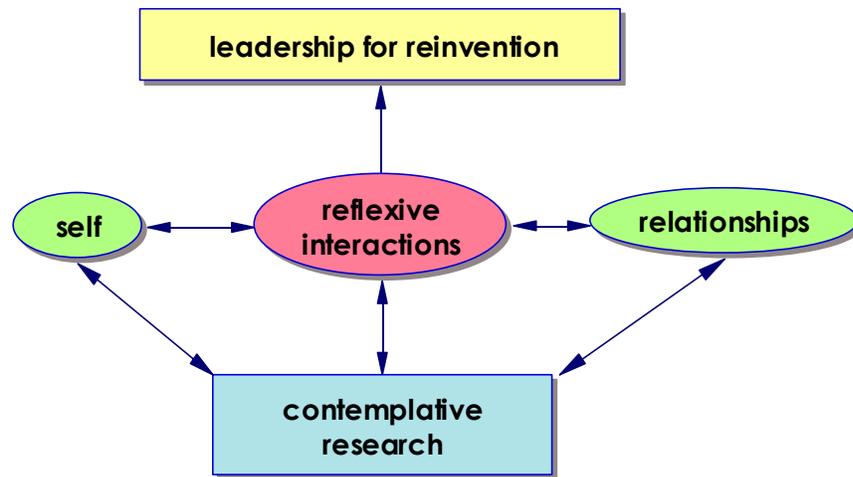
Most theories of leadership are inadequate for a reinventing school. 'Strong man', charismatic approaches to leadership will not encourage community members to claim

their own power and leadership; shared leadership models pay insufficient notice to the need for strategic leadership and the ultimate accountability of those in designated leadership positions; and servant leadership can result in the 'enslavement' of designated leaders. Emerging leadership theories such as parallel leadership (Crowther et al., 2001b), Level 5 leadership (Collins, 2001), situated leadership (Kirkham, 2005; Louis & Riley, 2000), relational leadership for change (Dyer, 2001; Louis & Riley, 2000), and values-based contingency leadership (C. Day et al., 2001b; C. Day et al., 2000), as discussed in Chapters 3 and 8, are more suited to the leadership needs of reinventing schools. Based on the insights obtained from this study, a new model of leadership for a reinventing school – contemplative-reflexive leadership - is presented.

### **Leadership for a reinventing school – contemplative-reflexive leadership**

No matter how well a process is planned, there will always be situational or contextual factors which cannot be anticipated. In as complex a process as the reinvention of a school, those responsible for leadership must always be able to adapt, without losing sight of the original purpose and direction. Indeed, one of the most important steps in a reinvention process is to remain open to differing and/or conflicting opinions and to keep searching for forums for dissent to be expressed and heard even though the 'difficulty of sustaining both flexibility of response and belief in the outcome that inspired the decision' (MacBeath & MacDonald, 2000, p.25) is both major and constant. Despite the best plans, the context within which reinvention occurs is constantly changing, requiring innovative responses to new needs and situations. Moreover, the dynamics of relationships within the community is of great importance. The reactions of people, even those whom a leader knows well and with whom s/he has worked for a long time, cannot always be anticipated. Yet it is the quality of relationships which essentially determines the health of the community and which will largely determine the outcome of the reinvention process. The model of contemplative-reflexive leadership for reinvention, outlined in Figure 9.5, facilitates the dynamic of adapting to constant change through constant engagement in authentic relationships based on core values.

This model acknowledges the need for leaders, in particular the principal, to be in touch with their own 'self', aware of their strengths and weaknesses, able to feel, and therefore to empathise with others, able to articulate the values which influence them, and open to their own ongoing transformation and growth as a human being.



**Figure 9.5: Contemplative-reflexive leadership for reinvention**

In fact, the principal of a reinventing school needs to be the ‘leading learner’ of the school. This is a challenge, since this person must at once inspire sufficient confidence in the school community if members are to find the courage for such major change, and also be open to deep listening and learning. Learning of this type is humbling, as it is undoubtedly the result of making mistakes, learning from them, and acknowledging the learnings made. This process of contemplation is pivotally important. Yet the contemplation needs to be enhanced by additional information, which is derived from values, as well as from the literature, from the insights of fellow-practitioners, and/or from a spiritual tradition in order to avoid the risk of falling into a narcissistic rut. Hence the model refers to ‘contemplative research’. Both contemplation and research are needed.

Contemplative research also involves both the leader and others in the community reflecting on relationships, both the quality of those relationships as ends in themselves, and in the outcomes of those relationships, such as new ideas and insights, positive feedback, critique and criticism. The critique and criticism of actions and interactions which stem from such contemplative research are particularly important.

The contemplative-reflexive leadership model is based on action. In the white-water of 21<sup>st</sup> century change, no one can provide definitive answers for how a community needs to adapt. The steps in the framework for reinvention outlined above are simply that – steps in a process. Every community needs to do for itself the hard work of thinking and experimenting to discover the answers for itself. Hence, the core aspect of contemplative-reflexive leadership for reinvention is the element of reflexive interactions. These are interactions with others, with ideas and with new structures and processes. Because of the emphasis on values, on reflection and on respect for others implied in reflexive

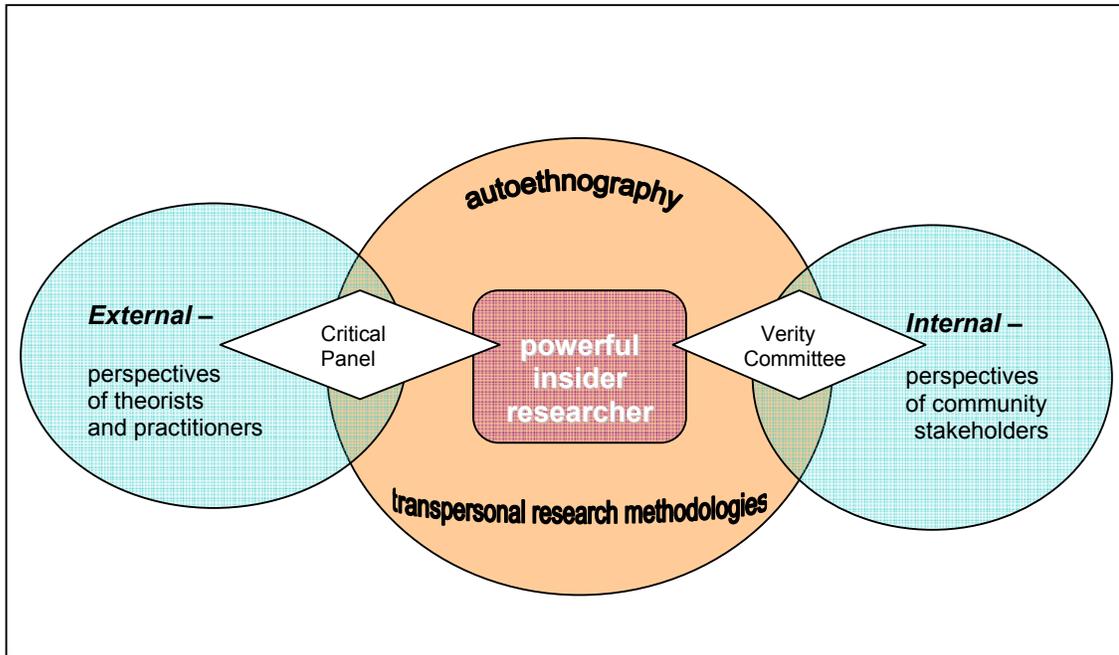
interactions, the contemplative-reflexive leadership model is appropriate for a school in the Mary Ward tradition, or indeed any Catholic school. The dynamic involves carefully reflected thought, trying out a solution or course of action, critiquing its effectiveness against the values and aims of the community and then adapting, in an ongoing cycle of tentative trialling, reminiscent of Fullan's (1998b) 'ready, fire, aim' analogy.

Taken together, the elements of this model make for a way of respectful, relational, values-based, research-informed and action-oriented leadership for major change in a rapidly changing context. Similar elements underpin the new model for insider research for those in positions of power who are studying their own organisation. The Powerful Insider Research Method (PIRM) is the third major contribution of this study.

### **The PIRM model for insider research**

For a range of reasons, discussed in Chapters 4 and 5, the study of the reinvention of Loreto Normanhurst was highly risky. The researcher/principal's connection of the research traditions of autoethnography and transformational research methods with her own methodological innovations of the Verity Committee and the Critical Panel constitutes a model for particular types of insider research. Insider research that is undertaken by researchers who are already members of the group they are researching, who intend to remain within that group after the research is concluded, and who are in positions of power within that group, is fraught with complex ethical and methodological problems. The methods used in this study, for the most part, successfully overcame these problems, and are now presented as a model from which other researchers in similar circumstances may benefit. This model is referred to as the Powerful Insider Research Method (PIRM) and is depicted in Figure 9.6.

Figure 9.6 draws on and expands Figure 4.1 (see Chapter 4), in illustrating how the 'powerful insider' is not only connected to the internal and external context of his/her research, through the Verity Committee and Critical Panel respectively, but is also working from the theoretical frameworks of both autoethnography and transpersonal methodologies. The overall framework within which the researcher works is therefore influenced by a range of perspectives, theoretical, contextual and phenomenological. The points of intersection in the diagram illustrate the mutual influence of several factors on the researcher and other groups.



**Figure 9.6 PIRM – Powerful Insider Research Method: a research model for use by insider researchers in positions of power in their own organisation**

The role of the Verity Committee proved to be of major importance in this study, playing an ‘ombudsman’ role for staff during the conduct of the research. Similarly important was the role of the Critical Panel. Not only did this latter group provide support for the Verity Committee, and a place to take potential staff concerns, but it also provided a safeguard for the integrity of the research, assisting as a referent group for the researcher in the validation of the research processes (see Appendix 7). Yet these methodological innovations needed to be situated within a research tradition sympathetic to the particular circumstances of an insider who is already part of the community or organisation being studied.

The traditions of autoethnography and transpersonal research methodologies met this need well, as discussed in Chapters 4 and 5. Autoethnography, within the qualitative research paradigm, accommodates the perspective of the insider researcher who is also a major player in the organisation being studied. Transpersonal research methodologies allow for and anticipate the fact that any insider researcher will necessarily be changed in the process of conducting the research. The combination of these approaches in this research study was useful to this researcher/principal in making sense of the personal struggles and soul-searching that were part of this study and of the reinvention of the school, and enabled her to understand that these were a legitimate and necessary part of both processes. The PIRM model, as a whole, provides protection for participants and for the research, facilitates feedback to the insider researcher in a position of power, and

supports him/her in making meaning of the personal transformation which is an integral part of such research.

In conclusion, all worthwhile research gives rise to further questions and areas for future study. This research is no exception. Hence, the final section consists of recommendations for further study.

## ***Recommendations for further study***

### **Recommendation 1**

An area which would benefit from further study is associated with the role of first-generation lay principals in Catholic schools. These leaders, of whom the principal/researcher is one, have a major part to play in ensuring that the charism and ethos of Catholic schools are continued into the future, in an era where there are likely to be few, if any, religious to lead or teach in Catholic schools. In one generation, the staffing of Catholic schools has changed completely. This responsibility for the continuation of the charism and ethos occurs at a time when many, or most, of the students in Catholic schools are 'unchurched', with parents who are not active churchgoers themselves. Despite these responsibilities, first-generation principals of Catholic schools are often regarded with a degree of suspicion by both Church authorities and by the wider school community, particularly older ex-students. Further study of this area of leadership would be advantageous.

### **Recommendation 2**

Research into the complex and often paradoxical cultures within school staff communities would be a further area for ongoing study. Greater understanding of the cultural and political nuances among this professional group would be valuable in supporting staff, addressing change and ensuring that schools remain dynamic rather than static in their approach to providing quality education for future members of the community and society.

### **Recommendation 3**

The reinvention of Loreto Normanhurst is intended to be an ongoing process. Further study of the school, and its continual modification of the Loreto Normanhurst Student Growth Model to accommodate changing needs, would be of benefit.

### **Recommendation 4**

The three major contributions of this study:

1. the framework for reinventing a school;

2. the contemplative-reflexive leadership for reinvention model; and
3. the Powerful Insider Research Method (PIRM) for insider research conducted by existing members of an organisation who are in positions of power could be studied further as they are implemented in other contexts and situations.

Finally, while the challenges facing schools in the 21<sup>st</sup> century are many, it is heartening to note that there is no dearth of able and dedicated practitioners, theorists and researchers who are committed to the well-being and learning of young people all over the world, and their development into fully alive human beings. New and emerging forms of schooling, of learning, and of leadership are making this more possible, to the benefit and growth of individuals and communities. This study, by describing and analysing, from the inside out, a living process of reinvention aimed at meeting the needs of 21<sup>st</sup> century young people, makes an important contribution to assist other practitioners and scholars to make schooling a rich and relevant experience for young people and their families. It is a future full of hope.

## GLOSSARY OF TERMS AND ACRONYMS

### Definitions

- Charism** In the Catholic tradition, this term refers to 'gifts' or 'graces' given by God to be used in the service of other people, the Church and the wider world (Catholic Church, 1994; McBrien, 1981).
- A charism is a power, generally of a spiritual nature, believed to be a freely given gift by the grace of God. (<http://en.wikipedia.org/wiki/Charism>)
- In terms of a religious order, it refers to the overall philosophy and lifestyle of the group, a model of spirituality that may inspire members of the Church (O'Donnell, 2000).
- Community** In the Catholic tradition, this term is used in a range of different ways. It may refer to a group of members of a religious order who live in the same property, but it can also be used in relation to the Catholic Church as a whole, or as a school or parish group. The 'faith community' means a particular group of believers, for example, in a school, parish or general community who pray, worship and share a common religious faith (O'Donnell, 2000).
- In the education literature, Beck (1999) identified six different metaphors for community: ontological, psychological, behavioural, structural, political and ethical. Rather than confusion, Beck claims that this indicates a richness and complexity in the concept (Mitchell & Sackney, 2000).
- Throughout this study, while there are overtones of the religious definition, the term will generally refer to a group of people who strive to live, work and create meaning together in ways that are interdependent and mutually supportive, and particularly to the students, parents and staff of the school.
- Ethos** The fundamental spiritual characteristics of a culture, including those within Catholic schools (Slattery, 1998)
- The characteristic spirit of a culture. (The Compact Oxford English Dictionary of Current English, 2002).
- Reinvention** A profound level of change and transformation, which involves a 'radical questioning of purpose and strategy' (Senge et al., 1999). Rather than a single change process, reinvention is an ongoing, dynamic process of double-loop (Argyris, 1992a), second order (Cuban, 1988; Holly, 1990), or 'third wave' learning (Banathy, 1988, as cited in Holly 1990; Corner, 2000; Reynolds & Stoll, 1996; Stoll, Reynolds, Creemers, & Hopkins, 1996).
- Strategy** The direction that the school sought to move towards, rather than the means by which this direction would be achieved.

### Acronyms

- EQ** Emotional intelligence, the development of self-awareness, emotional sensitivity, empathy and self-discipline.
- FACE** The Faith-Academic-Community-Extra-curricular holistic approach to curriculum which was central to the new paradigm of schooling at Loreto Normanhurst.
- HC** House Coordinator, a role which carried responsibility for the welfare of students in a vertically-organised House system. At Loreto Normanhurst there were eight Houses, each with approximately 112 students, organised into six Tutor groups, each with a Tutor teacher.

HoD	Head of Department, responsible for leading an academic faculty, such as History or Mathematics.
HSC	The Higher School Certificate, the high-stakes, end of high school credential administered by the New South Wales Board of Studies.
IBVM	Institute of the Blessed Virgin Mary, or Loreto sisters – the religious order which owned the school.
ICT	Information and Communication Technologies
KLA	Key Learning Area, an area of academic studies into which particular disciplines are organised eg. Creative and Performing Arts.
LNSGM	The Loreto Normanhurst Student Growth Model, the name given to the new paradigm of holistic schooling at Loreto Normanhurst.
LRC	The Learning Resource Centre, the learning hub at Loreto Normanhurst, which incorporated but transcended the concept of a traditional library and included a range of additional services such as multi-media facilities, Careers advisors' offices and adult learning/meeting facilities.
SETt	Strategy Evaluation Think-tank, a cross-sectoral group of teachers and members of the Leadership Team who met regularly fortnightly to address ongoing evaluation of the LNSGM and ideas or concerns of staff with regard to the Model.
UAI	Universities' Admissions Index, the moderated four-digit score, based on a student's HSC performance, which would provide entry to particular university courses.

### **Terms associated with the Loreto Normanhurst Student Growth Model**

Digital portfolio	Student work stored on the My Site (see below) which provides evidence of learning and growth in all areas of the FACE curriculum.
Integrated Learning:	a skills-based program, in which the content was the 'stuff of life', which enabled students to develop skills in information Literacy, Information and Communication Technologies, and Emotional Intelligence. It incorporated all the FACE elements, and was taught by the Year Team associated with each Year group.
Holistic task	An extended task, usually a semester long, in which a student demonstrated her understanding of skills and content related to the overarching concept eg 'Identity' in Year 7. These tasks were scaffolded and assessed against a rubric developed with students at the outset of the task. Students were required to work in groups on many aspects of the holistic task, and their completion was marked by a public presentation and celebration.
My site	A 'piece' of cyberspace on the Loreto Normanhurst hard drive on which students and staff members can maintain work in progress, store past work and establish 'share' portfolios with others.
Plenary meetings:	A twice-yearly meeting for each student with her parents and advisor. These meetings were led by the student, in which she articulated her learning and growth over the previous semester.
Student-advisor conversation:	A regular meeting between each student and her advisor in which the student would reflect on her learning and growth.
Year Team	A team of eight volunteer teachers who worked closely together to teach and care for the holistic needs of a Year group of approximately 150 girls. Year team members met regularly with each of the students in their Advisory group, tracking their growth and learning. They usually taught an academic subject to

a group within that Year group. They formed a close collaborative work team for one year, planning and teaching the Integrated Learning program.

**Strategy Core Team:** This group was a sub-set of the Leadership Team, responsible for 'project-management' and communication of the strategy. It was established informally, with two members, in 2001; grew to five members by 2003; and was disbanded in 2004. Its tasks were taken by the full Leadership Team.

**Strategy Evaluation Think-tank:** A cross-sectoral group of teachers and members of the Leadership Team who met regularly fortnightly to address ongoing evaluation of the LNSGM and ideas or concerns of staff with regard to the Model.

**Strategy Team:** The cross-sectoral group of staff members, parents, ex-students, IBVM and School Council members who developed the initial draft strategy from school-based data. This group was at first a decision-making body, but later became advisory to the process. The Strategy Team originally met three times per year, reduced to twice in 2005.

### **Terms used to identify categories of documents**

BF 01-03	3 documents relating to buildings and facilities
ChP 01-13	13 documents relating to change processes
CP 01-25	25 documents relating to the Critical Panel
EV 01-10	10 documents relating to evaluation processes
IF 01-11	11 focus group interview transcripts
II 01-08	8 individual interview transcripts
J200101-05-J200412	31 researcher journal documents from 2001 to 2004
KI-01 - KI-41	41 specific Key Informants quoted in the study
SC 01-43	43 School Council documents
SCT 01-15	15 documents relating to the Strategy Core Team
SET 01-14	14 Strategy Evaluation Think-tank documents
Staff Meet 01-06	6 documents relating to staff meetings
Strat plan 01-17	17 documents relating to strategic planning
Staff survey	115 documents relating to the January 2004 staff survey

### **Terms used to identify the category of respondent in the staff survey, 2004**

B	Boarding staff member
HoD/HC	Middle manager, either Head of Department or House Coordinator
LT	Leadership Team member
S	Support staff member eg secretary, laboratory assistant, library assistant
T	Teacher

# APPENDICES

## Appendix 1

### Appendix 1: Loreto Normanhurst Mission Statement

#### Loreto Normanhurst Mission Statement

Loreto Normanhurst, in the spirit of Mary Ward, as a school community:

- encourages each student to fulfil her academic and personal potential, in an atmosphere of freedom, care and respect for the individual
- celebrates a joyous Christian faith which grows from reflection and leads to justice
- develops independent, articulate and compassionate women of integrity.

### Appendix 2: Loreto Normanhurst enrolment policy

#### ENROLMENT POLICY FOR LORETO NORMANHURST

*The educational vision of Loreto schools springs from the Gospel of Jesus Christ....This is our vision: that Loreto schools offer a Catholic education which liberates, empowers and motivates students to use their individual gifts with confidence, creativity and generosity in loving and responsible service.*

Loreto Schools of Australia Mission Statement

1998

#### RATIONALE

Loreto Normanhurst provides an education within the Catholic, and specifically Loreto tradition. We therefore continually seek to animate, renew and empower students, staff and parents to share in the ministry of the Church. The charism of Mary Ward provides a basis for the selection of families who seek enrolment. Her special ministry was the fostering and developing of the Catholic faith in England at a time when it was under siege in England. Our Catholic faith in contemporary Australia faces different but similarly real challenges in the form of secularism, apathy and relativism. Hence our School needs to be a place where our Catholic Christian faith is fostered and developed.

Mary Ward's values of justice, integrity, truth, felicity and freedom, as well as a deep respect for the contribution of women, underpin the mission of our School and every aspect of school life. We seek to be a place where all people are invited to grow in their knowledge and love of God and to embrace the gospel. Each year, this invitation is extended to new students and their families.

#### PRINCIPLES

1. In selecting students for enrolment, primary consideration will be given to congruence with Catholic values and the ethos of the School. Priority will therefore be given to families who profess to be Catholic, although the Principal has some discretionary power in this matter.
2. Families need to provide evidence of involvement in the broad mission of the Church. This will take the form of a guided reference from a person in an appropriate position, such as Parish priest or minister, Principal of a Catholic primary school, or current Loreto family.
3. Other factors which may be taken into account in selecting students include: previous connection with the School or other Loreto schools, length of time on the waiting list, siblings already in the School, vacancies in the boarding school (if applicable). Special consideration may be given to degree of isolation in the case of applicants for boarding places and to families transferring from interstate or overseas.
4. The percentage of families who do not profess to be Catholic will not normally exceed 5% of the total enrolment of the School. Such families need to be made aware from the outset that their daughters will not be eligible to be Liturgy Captain or Eucharistic minister.
5. Loreto Normanhurst recognises the uniqueness of each student. The whole school community benefits when the diversity of strengths and needs of individuals is acknowledged and catered for. Therefore, the School is not academically selective.

At the same time, the School must be able to provide for the specific needs, educational and other, of a student seeking enrolment. Parent(s)/ guardian(s) may be asked to provide expert opinion from independent specialists so that a decision is based on sound educational data.

6. Loreto schools fulfil their mission in partnership with parents, who are the first educators of their children. Hence Loreto schools expect that parents of students will be actively involved in their children's education. This involvement may take a variety of forms. This expectation is a criterion for enrolment in a Loreto school.
7. Acceptance of an application form will not guarantee an enrolment interview or an offer of enrolment.
8. The Loreto Normanhurst enrolment policy will be publicly available. It will make clear the enrolment priority and criteria.
9. The following information will also be publicly available:
  - a. procedure for application
  - b. details of Application and Enrolment Fees and when these are payable
  - c. details of information sessions, Open Days, orientation days, interviews
  - d. details of the interview process
  - e. details of the school's schedule of fees and payment policy
  - f. timeline for processing applications
  - g. outline of enrolment conditions and the requirement of formal acceptance of these
  - h. parental obligations and expectations of parents by the School
10. Once the number of applicants for a given year's intake for Year 7 reaches one hundred over the number of places available, then no further formal applications or Application Fees will be accepted.

Parents wishing to apply after this number has been reached will be invited to join a Reserve List on payment of a small fee to cover costs. If a family moves from the Reserve List to the list of applicants they will be required to pay the difference between the Reserve Fee and the Application Fee.
11. Parent(s) or guardian(s) will be required to declare that to the best of their knowledge They have:
  - disclosed any special needs of the prospective student;
  - disclosed any particular medical or psychological condition and/or health care requirements of the prospective student;
  - provided a copy of any Parenting or Restraint Order that applies to the prospective student and /or parent/s; and
  - fully completed the application and enrolment forms.

If a parent or guardian withholds information relevant to the application/enrolment process then the Principal reserves the right to refuse, or terminate enrolment on that ground.
12. Both parents or guardians will be required, jointly and severally, formally to accept responsibility for the payment of all school fees.
13. When accepting a place at Loreto Normanhurst parents are deemed to have accepted the School's values and expectations and to continue to endorse and support them.
14. The decision on whether the student is to be enrolled will ideally be made in partnership with the parent(s)/guardian(s) based on the school's ability to cater for the student's needs. The final decision in matters of enrolment rests with the Principal.
15. All Loreto Normanhurst policies are subject to regular and systematic review.

Endorsed by the Loreto Normanhurst School Council  
29 January 2001

### Appendix 3: Information provided to research participants - Reinventing Loreto Normanhurst 1994-2004 ... steps in the process

#### 1994

- Term 2 first lay Principal begins
- Strategy process *Future Directions 1994-1999* endorsed by School Council
- Term 3 community workshops to:
  - establish the areas for future development
  - develop a Mission Statement for the school
- Directions set by the process and the Loreto Normanhurst Mission Statement endorsed by School Council
- Priority areas identified:

#### EDUCATIONAL ISSUES

- curriculum
  - need for an evaluation of current curriculum offerings to ensure that we offer:
  - sufficient support for the range of academic abilities
  - subjects appropriate to our students' interests and needs
  - vocational education opportunities
  - appropriate languages
- technology in education
  - need to research how technology can be linked to teaching and learning
- pedagogy
  - development of more student autonomy in learning
- sport
  - development of improved facilities and equipment
  - more opportunities for all students to take part in sport teams

#### THE RELIGIOUS DIMENSION

- need for a review of this area of School life, including:
  - RE programs
  - sacramental life
  - links with parish
  - social justice initiatives, especially in the local community
  - Ignatian/Mary Ward spirituality

#### PEOPLE ISSUES

- boarding lifestyle
  - develop a more homely atmosphere for boarders
  - more structured weekend activities
- parent involvement and communication within the community
  - the role and operation of PAL (Parent Association Loreto)
  - more social events and get-togethers
  - parent-teacher interviews
  - timing of information to boarder parents
- staff support and development
- pastoral care

#### BUILDINGS AND RESOURCES

- buildings, facilities and environment
- need for a masterplan for development and refurbishment of buildings, with a time-line for implementation

- development office
  - need for a development office with responsibility for:
    - fundraising
    - friending, particularly of ex-students
    - publicity
    - archives
    - enrolment
- finance

### 1995

- Tanner and Associates appointed as masterplan architects. Work begins on major building project
- Unsuccessful submission made to Block Grant Authority for capital grant to assist with building of new boarding school
- Development Office established; Development Officer and archivist appointed; first issues of *Loreto Life*
- Centenary coordinator appointed and committee established
- Student curriculum survey on curriculum offerings and quality of teaching/ learning
- Curriculum review conducted: decision made to offer Japanese, Legal Studies, Science for Life
- Information Technology Statement developed; increased staffing for IT; budget approved by School Council for first phase of technology plan; Scholas implemented
- Autonomous Learning committee established
- Fitness Centre established in the gym
- Wider range of sports offered; first hockey/netball tour overseas conducted
- Boarder accommodation in Mary Ward refurbished
- Planning for new boarding school accommodation begun
- Constitution developed for the Parent Association
- Staff Support and Development Committee set up to identify and address needs of staff

### 1996

- Second unsuccessful submission made to Block Grant Authority for capital grant to assist with building of new boarding school
- Building priorities moved to new LRS and Aquatic Centre
- Capital appeal begun for new buildings
- First Loreto Normanhurst rowing regatta held
- Social Justice coordinator
- Preparations made for the Centenary eucharist and centenary focus on social justice
- RE curriculum reviewed
- Sunday leisure program for boarders begun
- Dormitories renamed after places where Mary Ward lived
- New infirmary set up in boarding school
- Staff appraisal processes developed
- Decision made to implement Vertical Pastoral Care. VPC Committee established

### 1997

- Centenary Year
- IT Coordinator position established
- Loreto Normanhurst website established
- Staff laptop program begins
- Centenary tour to Yorkshire and Ireland conducted
- School Chaplain appointed

### 1998

- Four new Houses established: Aston, Kendall, Kuring-gai, Maye
- Vertical Pastoral Care begun in Term 4

### 1999

- conclusion of *Future Directions 1994-1999*
- Inaugural staff scholarship study conducted on systems of organisational improvement in the UK: Investors in People and Business Excellence
- Workshops conducted with Julia Atkin on new learning and pedagogies
- Loreto 5 concept established
- Health Centre established in former Director of Boarding house
- Director of ICT position established

### 2000

- New LRC and Aquatic Centre opened
- First Loreto 5 group established
- Findings of 1999 staff scholarship study reported
- New strategy process developed by Leadership Team. Essential elements:
  - transparency
  - simplicity
  - wide-spread consultation
  - ownership by all stakeholder groups
- (June) Process endorsed by School Council
- Adrian Dart appointed as facilitator
- Process within the school led by Nicole Mockler/ Leoni Degenhardt
- Future Directions survey of all staff; teacher satisfaction survey; student focus groups; survey of students on learning preferences conducted
- Strategy Team established, with members from all school community sectors. It has decision-making status. First meeting of Strategy Team held in December
- Retirement of Deputy, Judy Hourigan

### 2001

- New Deputy Principal, Barbara Watkins, took up appointment
- Anne Corrigan appointed as Director of Pastoral Care
- Strategy Team meetings held in February, June, November
- Draft strategy developed by Strategy Team
- Strategy Workshops held for all staff
- Workshops and consultation held with other school community groups
- (June) Strategy Team lock-in workshop: final strategy developed
- (July) Strategy endorsed by School Council, and shared with staff
- Strategy communicated to all stakeholder groups
- Strategy Strengthening (change management & leadership) workshops made available for staff (63 attended)
- Strategy Core Team established, chaired by Nicole Mockler. Purpose: process management and communication
- Work begins on Individual Student Growth Plans (ISGPs):
  - ISGP workshops open to all teachers (47 attended); from these workshops 10 Principles for ISGPs developed all teachers invited to submit models (9 submitted)
  - teaching staff critique models
  - first ISGP task force established
  - model developed by task force presented to teaching staff (December)
- EOWA award for Loreto Normanhurst
- Leadership Team restructured to support **...growing individuals and communities...**:
  - Director of Administration
  - Director of Professional Learning
  - Direction of Mission

### 2002

- Leanne Stephen took up appointment as Director of Student Learning, resigned in December
- Strategy Team meetings held in February, June, November.
- Further development of ISGPs
  - ISGP task force 2 established
  - model 2 of ISGPs presented to teaching staff by end Term 1
  - critique conducted of model 2 in Term 2 by staff, students, parents, School Council
  - name changed to Student Growth Plans
  - visits to local and overseas schools conducted by Principal
  - Implementation Team established (Term 4)
- Parent Strategy workshops conducted
- Professional development workshop provided for staff on Emotional Intelligence

### 2003

- Sue Johns appointed Acting Director of Student Learning, retired through ill health (June)
- Barbara Watkins filled above role in addition to Deputy Principal role for remainder of year
- Strategy Team meetings held in February, June, November. Status now advisory,
- Implementation Team worked throughout the year on a range of implementation issues eg role of advisor, advisor conversations, timetable, development of curriculum principles
- Applications sought (internal and external) for positions on Year 7 2004 Team
- Negotiation conducted with teaching staff over Year 7 2004 Team conditions
- (End Term 2) Year 7 2004 Team appointed, 2 members from outside the school
- Work on Student Growth Plans continued:
  - Year 7 syllabus documents reviewed by faculties, outcomes that can be met through Integrated Curriculum identified
  - Digital portfolio technology developed
  - Ways of integrating the new system with the existing school structure eg House identified
- Professional development on learning conducted with Jenny Little
- Year 7 2004 Team meetings held regularly to develop Year 7 curriculum, especially for Integrated Curriculum, in conjunction with Heads of Department
- Decision taken to convert Hall to Year 7 Learning Area and for future building to include new learning areas for future Year groups
- Parent workshops on Emotional Intelligence held
- Information sessions with parents of Year 7 2004 held
- Year 7 2004 Student Growth Plans developed in Term 4 in plenary meetings with students, parents and advisors
- Hall converted for use by Year 7 2004 (summer 2003/4)
- Plans developed for next major building project, including two floors of flexible learning space

### 2004

- Year 7 2004 introduced, using the new paradigm
- Hall re-named as the Deirdre Rofe Centre



### Appendix 4: Information provided to research participants - Outline of Catholic and Mary Ward values

#### Outline of Catholic and Mary Ward values

##### **A Catholic school...**

- Is focused on the person and message of Jesus
- Is inspired by gospel values such as faith, hope, love, justice, mercy, compassion and the fruits of the spirit
- Seeks to infuse its faith worldview into all its activities, integrating faith and culture
- Recognises parents as the primary educators of their children
- Emphasises Catholic values such as:
  - the belief that people are essentially good, made in God's image, although flawed
  - belief in the principle of sacramentality: that God is in all things and the sacred is expressed and experienced in and through material things
  - an emphasis on relationship and community
  - a commitment to history and tradition
  - wisdom rationality, a reflective way of knowing – the role of reason, informed by love and wisdom
  - spirituality, seeking holiness of life and goodness
  - working for justice and social values
  - hospitality, seeking for the truth wherever it can be found

##### **Sources:**

Sacred Congregation for Catholic

##### **A school in the Mary Ward tradition...**

- Is primarily a Catholic school: committed to genuine reform and renewal of the Church at all times
- The spirit and values which inspired Mary Ward enrich its identity as a Catholic school: love of Jesus, freedom, justice, sincerity, verity, felicity
- Has a profound belief in the capacity of women as significant contributors to both Church and society
- Provides a broad liberal education, with emphasis on the creative and performing arts and literature
- Respects intellectual rigour and breadth
- Forms habits of reflection and discernment in making choices and “referring all things to God”
- Understands that “the teaching under the teaching” is important: sincere relationships are central to the learning and development of all in the school community. The adults provide sound modelling.
- Aspires to the pursuit of excellence, not in a competitive or perfectionist sense, but in a transcendent way: doing one's best and then relying on God to do the rest
- Accepts the challenge of change: Mary Ward strove to educate in and for society, not apart from it
- Develops a social conscience in the members of its community
- Follows Mary Ward's aim of educating young women “for a praiseworthy Christian life in the world” – living with integrity and hope.

*(confirmed by Sr Noni Mitchell IBVM and some members of the Loreto Kirribilli IBVM community.)*

*Sr Noni Mitchell IBVM is a former Provincial Superior (Australia) and General Superior (Irish Branch) of the IBVM (Loreto sisters). Sr Noni is a qualified medical practitioner and taught Science at Loreto Normanhurst many years ago.*

**Appendix 5: University research consent letters**

**INFORMATION LETTER TO PARTICIPANTS**

TITLE OF PROJECT:

**REINVENTING A SCHOOL FOR THE 21<sup>ST</sup> CENTURY: A CASE STUDY OF CHANGE IN  
A MARY WARD SCHOOL**

NAMES OF SUPERVISORS:

**PROFESSOR PATRICK DUIGNAN  
ASSOCIATE PROFESSOR DEIRDRE DUNCAN**

NAME OF RESEARCHER:

**LEONI DEGENHARDT**

NAME OF PROGRAMME IN WHICH ENROLLED:

Doctor of Philosophy

Thank you for your interest and potential involvement in this research on the reinvention of Loreto Normanhurst. The research will record and critique the process of reinvention within the school during the period of 2000 till the end of 2003: what happened, how it happened, what worked and what did not work as well as we would have liked. The research method I am using is mainly qualitative: it is important to have the views and hear the voices of a wide group of people within the school community.

A. You will be asked to take part in a focus group, together with a number of other participants, which will be conducted by the Director of Professional Learning, Ms Nicole Mockler, and tape-recorded. I will be an observer in this focus group. It will last approximately one hour.

OR

B. You will be asked to respond to interview questions in an interview which will last approximately half an hour and will be tape-recorded. I will provide you with a transcription of the interview, and you may reformulate or remove any comments or expressions that do not represent your views or experience.

There will be many potential learnings from this research for our own school community as we try to meet new needs of students, parents and staff, while holding on to our enduring Catholic and Mary Ward values. It will give us a better understanding of the research on school change. It will ensure that our work in adapting our school to meet the needs of the times is properly recorded and evaluated. It will also possibly be of use to other schools who wish to adapt and change. The findings of the research will be presented in a thesis and may also be published in book form at some time in the future. When the research is completed, the findings will be made available to the Loreto Normanhurst school community.

This letter is an invitation to participate in the research. You do not have to accept this invitation, and are free to refuse consent altogether without having to justify or explain your decision. You can also withdraw your consent and discontinue participation in the study at any time without giving a reason.

Please be assured that if you withdraw from the research it will not prejudice your (or your daughter's) future care or academic progress.

## Appendix 5 (contd)

The data collected will be confidential. However, it is important to have the opportunity to hear the views of people in a conversational way. While your identity will be known to me, your responses and comments will not be able to be traced to you: it will be aggregated into the research data. Confidentiality will be maintained during the conduct of the research and in any report or publication arising from it. Since this research is not based on deeply personal issues, it is not anticipated that there will be any limits to confidentiality in this particular project. A Verity Committee has been set up within the school for the purposes of this research. This Committee will address, in confidence, any concerns that you may have about the research. Contact details for the Chair of the Verity Committee: Mrs Mary Lane

Phone: 02 9487 3488  
Fax: 02 9489 2348  
Email: [mhlane@loretonh.nsw.edu.au](mailto:mhlane@loretonh.nsw.edu.au)

Should you have any questions regarding this research project please feel free to direct them to me, as the researcher, or to either of my supervisors, Professor Patrick Duignan and Associate Professor Deirdre Duncan, whose details appear below.

Professor Patrick Duignan :	Associate Professor Deirdre Duncan:
Phone: 02 9739 2167	Phone: 02 9701 4000
Fax: 02 9739 2292	Fax: 02 9739 2292
Email: <a href="mailto:P.Duignan@mary.acu.edu.au">P.Duignan@mary.acu.edu.au</a>	Email: <a href="mailto:D.Duncan@mary.acu.edu.au">D.Duncan@mary.acu.edu.au</a>

Both Professor Duignan and Associate Professor Duncan are located at the:  
School of Educational Leadership, Australian Catholic University  
Mount St Mary's Campus  
25a Barker Road , Strathfield NSW 2135

This study has been approved by the Human Research Ethics Committee at Australian Catholic University. In the event that you have any complaint or concern about the way you have been treated during the study, or if you have any query that the Supervisors and Student Researcher have not been able to satisfy, you may write to the Chair of the Human Research Ethics Committee care of the nearest branch of the Research Services Unit. The address is listed below.

NSW/ACT:	Chair, HREC	
	C/o Research Services	Tel: 02 9701 4159
	Australian Catholic University	Fax: 02 9701 4350
	Sydney Campus	
	Locked Bag 2002, STRATHFIELD NSW 2135	

Any complaint or concern will be treated in confidence and fully investigated and you will be informed of the outcome.

If you agree to participate in this project, you should sign both copies of the Consent Form, retain one copy for your records and return the other copy to me at Loreto Normanhurst.

Yours sincerely

Leoni Degenhardt

**Researcher**

**CONSENT FORM**

TITLE OF PROJECT: **REINVENTING A SCHOOL FOR THE 21<sup>ST</sup> CENTURY: A CASE STUDY OF CHANGE IN A MARY WARD SCHOOL**

NAMES OF SUPERVISORS:  
**PROFESSOR PATRICK DUIGNAN**  
**ASSOCIATE PROFESSOR DEIRDRE DUNCAN**

NAME OF RESEARCHER : **LEONI DEGENHARDT**

I ..... have read and understood the information provided in the Letter to Participants. Any questions I have asked have been answered to my satisfaction. I agree to participate in this activity, realising that I can withdraw at any time. I agree that research data collected for the study may be published or may be provided to other researchers in a form that does not identify me in any way.

NAME OF PARTICIPANT: .....  
(block letters)

SIGNATURE ..... DATE .....

SIGNATURE OF SUPERVISOR:.....

DATE:.....

SIGNATURE OF RESEARCHER:.....

DATE:.....

**PARENT/GUARDIAN CONSENT FORM**

TITLE OF PROJECT: **REINVENTING A SCHOOL FOR THE 21<sup>ST</sup> CENTURY: A CASE STUDY OF CHANGE IN A MARY WARD SCHOOL**

NAMES OF SUPERVISORS:  
**PROFESSOR PATRICK DUIGNAN**  
**ASSOCIATE PROFESSOR DEIRDRE DUNCAN**

NAME OF RESEARCHER : **LEONI DEGENHARDT**

I ..... (*the parent/guardian*) have read and understood the information provided in the Letter to the Participants. Any questions I have asked have been answered to my satisfaction. I agree that my child, nominated below, may participate in this activity, realising that I can withdraw my consent at any time. I agree that research data collected for the study may be published or may be provided to other researchers in a form that does not identify my child in any way.

NAME OF PARENT/GUARDIAN: .....  
(block letters)

SIGNATURE ..... DATE.....

NAME OF CHILD .....  
(block letters)

SIGNATURE OF SUPERVISOR:  
..... DATE:.....

SIGNATURE OF RESEARCHER:  
..... DATE: .....

**ASSENT OF PARTICIPANTS AGED UNDER 18 YEARS**

I ..... (*the participant aged under 18 years*) understand what this research project is designed to explore. What I will be asked to do has been explained to me. I agree to take part in the project, realising that I can withdraw at any time without having to give a reason for my decision.

NAME OF PARTICIPANT AGED UNDER 18: .....  
(block letters)

SIGNATURE .....  
DATE.....

SIGNATURE OF SUPERVISOR:.....

DATE:.....

SIGNATURE OF RESEARCHER :.....

DATE:.....

### Appendix 6: Terms of reference for the Verity Committee

## VERITY COMMITTEE

### Terms of Reference

#### Context

Loreto Normanhurst is a school in the tradition of Mary Ward. Despite the fact that she lived almost four hundred years ago, her values – Freedom, Justice, Sincerity, Verity, Felicity and a belief in the capacity of women – remain alive in these schools today. Among Australian Mary Ward (or Loreto) schools, 2002 is the year in which we focus particularly on the value of Verity. For Mary Ward this word denoted “integrity and truth, particularly the profound truth of who we are and what gives meaning to our lives, a truth that centres fundamentally on the mystery of God.” (Honner, 1998).

The Principal of Loreto Normanhurst has engaged in a research project to document and critique the strategy process currently occurring within the school. She is not only a participant observer in this research but also holds a position of power vis a vis students, parents, and staff and is the employer, in the case of staff. In order to minimise the possibility of negative impact on participants and/or of adversely affecting the data because of her position within the school, the Principal/researcher intends to establish an internal Verity Committee.

#### Accountability

The Verity Committee will provide a further means of ensuring the ethical conduct of this research in addition to the standard requirements for all research conducted by students of the Australian Catholic University.

Every effort will be made in the research methodology to ensure that findings are sound and that individuals are free to contribute their opinions without fear of adverse consequences. The researcher must intend and work towards these outcomes; her research supervisors will provide a further check; and The Human Research Ethics Committee of Australian Catholic University must authorise all research methodology undertaken by its postgraduate students.

The Verity Committee does not bear responsibility for the design of the research methodology, nor for its progress. This responsibility is borne by the researcher and the University. The only accountability to which the Verity Committee must hold itself is moral: to act with integrity and truth.

#### Purpose

The purpose of the Verity Committee is to:

- act in an ombudsman role for community members who may have a concern with the research methodology. Any person with a concern about the research methodology, in principle or in practice, can preserve their anonymity through approaching the Chair or any member of this Committee.
- comment from time to time on the research design and methodology of the study, as a school-based referent group;
- assist as a referent group for the researcher in the validation of the research findings.

The committee’s role pertains only to the research in question. It has no role to play in the strategy process itself, nor in other matters relating to school life.

**Composition**

The structure of the Verity Committee has been determined by the researcher. It will consist of a Chair and three other members.

The Chair (ML) was appointed by the researcher in accordance with several criteria: her reputation in the minds of both staff and the Principal/researcher as a person of justice and integrity; her record as a fearless questioner (and former union representative); her experience as the inaugural staff scholarship winner, which she used to study systems of organisation improvement in the UK; her demonstrated perceptiveness regarding the ethical issues of research.

The Principal/researcher will inform all staff via email of the intention to establish the Verity Committee and its purpose. She will then invite any staff members interested in becoming members of the Committee to express their interest to the Chair. The Chair will then determine the rest of the membership from the expressions of interest, without reference to the Principal/researcher. If a member leaves the Committee for any reason, the Chair will call for further expressions of interest from staff and make an appointment. If the Chair leaves the Committee, the Principal/researcher will appoint a new Chair.

No remuneration – in the form of time or money – will be provided to the Chair or to members.

**Duration**

It is expected that the Verity Committee will continue until such time as the research is completed and the dissertation approved. After this time the Verity Committee will be disbanded.

**Meetings**

The Verity Committee will meet once a term at the discretion of the Chair, and more frequently if she deems necessary. Minutes will be taken of each meeting. These minutes will be held by the Chair. They will not be shown to the Principal/researcher unless the Chair of the Verity Committee decides that it is in the best interests of the research project. The minutes of all Verity Committee meetings will be forwarded to the Chair of the Critical Panel within a week of the meeting. After the dissertation has been accepted, the Chair of both the Verity Committee and the Critical Panel will confer to ensure the anonymity of individuals mentioned in the minutes, after which the minutes will be stored in the school archives.

**Support for the Verity Committee**

The Chair of the Verity Committee has direct access to the Chair of the Critical Panel and is encouraged, if she so chooses, to contact her to discuss any matter relating to the work of the Verity Committee.

Leoni Degenhardt  
19 March 2002

Revised: 26 March 2002; 10 November 2002; 17 January 2003; 16 February 2003

### Appendix 7: Terms of reference for the Critical Panel

## CRITICAL PANEL

### Terms of Reference

#### Context

The Principal of Loreto Normanhurst is engaged in a research project to document and analyse the strategy process currently occurring within the school. She is not only a participant observer in this research but also holds a position of power vis à vis students, parents, and staff, and is the employer, in the case of staff. In order to minimise the possibility of negative impact on participants and/or of adversely affecting the data because of her position within the school, the Principal/researcher has established an internal Verity Committee and an external Critical Panel.

#### Accountability

Every effort will be made in the research to ensure that the methodology and the findings are sound, and that individuals are free to contribute their opinions without fear of adverse consequences. The researcher must intend and work towards these outcomes and The Human Research Ethics Committee of Australian Catholic University must authorise all research methodology undertaken by its postgraduate students. The Critical Panel does not bear responsibility for the design of the research methodology, nor for its progress. This responsibility is borne by the researcher and the University. The only accountability to which the Critical Panel must hold itself is moral: to act with integrity and truth.

#### Purpose

The Critical Panel will provide a further means of ensuring the ethical conduct of this research in addition to the standard requirements for all research conducted by students of the Australian Catholic University. Its main role, however, is to provide a mechanism which can offer a detached view of the integrity of the research methodology and conclusions.

The purpose of the Critical Panel is to:

- protect the integrity of the research;
- critique the research design and methodology of the study;
- assist as a referent group for the researcher in the validation of the research findings;
- support and protect the Verity Committee in its task of acting in the role of ombudsman for community members who may have a concern with the research methodology. The Chair of the Verity Committee has direct access to the Chair of the Critical Panel;
- complement the work of the Verity Committee to prevent any issue pertinent to the research being overlooked.

The Critical Panel's role pertains only to the research in question. It has no role to play in the strategy process itself, nor in other matters relating to school life.

#### Composition

The Critical Panel is an honorary committee and will consist of a Chair and two other members.

##### *Chair:*

Dr Ruth Shatford, JP D. de l' U (Strasbourg) MA (Sydney) Dip Ed (Sydney) FRSA FACE MACEA Certificate III in Travel (pending). Dr Shatford is now retired. Her previous experience includes positions as:

- Senior lecturer in Education at Milperra College of Advanced Education (now the University of Western Sydney)
- Principal, Tara Anglican School for Girls, North Parramatta
- Director, International House, University of Sydney

**Members:**

Professor Ken Sinclair, BA (Sydney) EdM PhD (University of Illinois)

- Honorary Associate Professor, Faculty of Education, University of Sydney
- Prior to retirement in 1997, Head of School, Acting Dean, Faculty of Education, University of Sydney
- Educational psychologist with teaching and research interests in:
  - Motivation and cognition in learning and teaching
  - Information and communications technology in learning and teaching
  - Educational leadership
  - Transition from university to the workplace
- Former Chair, McDonald College of Performing Arts; former member of the Council of The Hills Grammar School

Sr Noni Mitchell IBVM AM D.UNIV (ACU) MB BS BSc Dip Ed

- Loreto sister
- Science teacher, Loreto Kirribilli and Normanhurst 1963-1969
- Principal, Loreto Kirribilli 1970
- Principal, Christ College, Oakleigh VIC 1971-1974
- Provincial Superior of the Australian Province IBVM, Melbourne 1974-1983
- General Superior of the IBVM (Irish Branch), Rome 1986-1998
- Honorary Doctorate of the University (ACU) awarded in 1997 for contributions to education and health care

**Duration**

It is expected that the Critical Panel will continue until such time as the research is completed and the dissertation approved. After this time the Critical Panel will be disbanded.

**Meetings**

The Critical Panel will receive the minutes of the Verity Committee, which will meet once a term at the discretion of the Chair, and more frequently if she deems necessary. The minutes will not be seen by the Principal/researcher. After the minutes have been sent, the Critical Panel will meet at the school in order to:

- be available to the Chair of the Verity Committee, if she wishes to meet with them
- discuss their perceptions of the progress of the research; and
- provide feedback to the researcher on the conduct of the research. The wisdom of the members, their familiarity with the requirements of academic research, and their objectivity as “outsiders” to the school community make the Critical Panel a valuable sounding board for the researcher, given her participant observer situation as Principal of the school under study.

The Chair will keep minutes of these meetings. After the dissertation has been accepted the minutes will be stored for the requisite time as prescribed by the university. If all members of both the Critical Panel and the Verity Committee give their signed approval, the minutes will then be transferred to the school archives.

Once the data collection is complete, the researcher will provide the Critical Panel with her draft conclusions for comment, discussion and critique. The Chair will provide a final report to the researcher following this meeting.

Leoni Degenhardt

25 October 2002

Revised: 21 November 2002; 17 January 2003; 16 February 2003; 22 February 2003; 24 March 2003

## Appendix 8: Data collection schedule, December 2003

### CASE STUDY: Data collection schedule

1 December 2003

**Title: Reinventing a school for the 21<sup>st</sup> century: a case study of change in a Mary Ward school.**

**Research Question** *(these questions may be adapted as the research proceeds)*

**How can a Mary Ward school reinvent itself to meet the needs of girls at the start of the 21<sup>st</sup> century?**

#### SUB-QUESTIONS

1. How did the reinvention process translate Mary Ward's vision and values into a school of the 21<sup>st</sup> century?
2. What were the steps in the reinvention process from 1994 till the start of 2004?
3. What factors assisted the reinvention process?
4. What factors hindered the reinvention process?
5. How was the reinvention process experienced by key stakeholders?
6. What types of leadership were used in the reinvention process?
7. To what extent had the school succeeded in reinventing itself by the start of 2004?
8. What were the learnings from the reinvention process?

#### Types of data to be collected

##### Researcher's reflective journal

**Document analysis:** academic results; enrolment trends; employment trends; minutes of meetings; publications by the school and the IBVM; 2 written reports

**Artefacts:** building plans; charts (Gantt, organisation); PowerPoint records; digital curriculum

**Interviews:** 11 focus groups; 8 individual interviews; 1 researcher survey and 6 standard annual school surveys

**Groups from whom information will be gathered:** staff; students; parents; governing body; Strategy Team; owners; external strategy process facilitator

#### Period of data collection

The case study covers the period from 1994 to the start of 2004. There will be two phases of data collection:

- An antecedent phase, from 1994 –2000, involving document analysis and interviews with a retrospective focus
- An intense phase, from 2001 – 2004, involving all the methods of data collection shown above.

	Staff	Students	Parents	School Council
<b>Who?</b>	<ol style="list-style-type: none"> <li>all staff</li> <li>all staff who wish to contribute</li> <li>teaching staff (stratified random sample of volunteers)</li> <li>non-teaching staff (stratified random sample of volunteers)</li> <li>Implementation Team</li> <li>Year 7 2004 Team</li> <li>Strategy Core Team 2003</li> <li>Registrar</li> <li>Director of Administration</li> </ol>	<ol style="list-style-type: none"> <li>all Year 12 2003 students</li> <li>students from Years 8 -12 2004 (stratified random selection of volunteers + student focus group leaders from 2003)</li> <li>students from Year 7 2004 (stratified random selection of volunteers)</li> </ol>	<ol style="list-style-type: none"> <li>all parents of students in Year 7,10 and 12</li> <li>P&amp; F executive 2002-2004 (all members who wish to participate)</li> <li>parents with children in the school from 1994 to 2003 (stratified random sample of all volunteer parents who meet this criterion)</li> <li>parents of Year 7 2004 (stratified random sample of volunteers)</li> </ol>	<ol style="list-style-type: none"> <li>all members of the 2004 Loreto Normanhurst School Council</li> </ol>
<b>How?</b>	<ol style="list-style-type: none"> <li>annual surveys (standard annual school survey; conducted and analysed by DoPL)</li> <li>research survey (time provided in staff day)</li> <li>focus group (conducted by external researcher; audiotaped and transcribed; researcher access to transcripts only)</li> <li>focus group (conducted by external researcher; audiotaped and transcribed; researcher access to transcripts only)</li> <li>focus group (conducted by external researcher; audiotaped and transcribed; researcher access to transcripts only)</li> <li>focus group (conducted by external researcher; audiotaped; researcher access to transcripts only)</li> <li>individual interviews (4) (conducted by external researcher; audiotaped; researcher access to transcripts only)</li> <li>8&amp;9.separate interviews (conducted by the external researcher; audiotaped and transcribed)</li> </ol>	<ol style="list-style-type: none"> <li>annual exit survey of all Year 12 2003 students (standard annual school survey; conducted and analysed by Director of Professional Learning (DoPL))</li> <li>focus group (conducted by researcher; audiotaped and transcribed)</li> <li>focus group (conducted by researcher; audiotaped and transcribed)</li> </ol>	<ol style="list-style-type: none"> <li>annual parent survey (standard annual school survey; conducted and analysed by DoPL)</li> <li>focus group (conducted by researcher; audiotaped and transcribed.)</li> <li>focus group (conducted by researcher; audiotaped and transcribed )</li> <li>focus group of 10 (conducted by researcher; audiotaped and transcribed )</li> </ol>	<ol style="list-style-type: none"> <li>focus group (conducted by researcher; audiotaped and transcribed)</li> </ol>

Appendix 8 (contd)

<p><b>Why?</b></p> <p>Why choose these participants?</p> <p>Why choose this method of data gathering?</p>	<ol style="list-style-type: none"> <li>Involving all staff makes it more likely that the full spectrum of perspectives is accessed. The school has conducted this staff satisfaction survey for the past 4 years. In 2003 the format changed to a more qualitative format. A survey offered to all permits this, although there is less opportunity for elaboration or explanation.</li> <li>as above, although this survey would be about the reinvention process only.</li> <li>a stratified sample of teachers will be used to form a focus group. A focus group will allow fuller exploration of ideas and issues raised in the survey of all staff.</li> <li>a stratified sample of non-teaching staff will be used to form a focus group. Non-teaching staff may have different perspectives on the reinvention than those of teachers. A focus group will allow fuller exploration of ideas and issues raised in the survey of all staff.</li> <li>The Implementation Team is a group of ten volunteer staff (with time release). It was established at the end of 2002 with the purpose of furthering the strategy process forward into 2004, and particularly, the development of Student Growth Plans (SGPs). It was established for one year only, and will disband at the end of 2003. A focus group will allow fuller exploration of ideas and issues.</li> <li>The Year 7 2004 Team was formed of volunteer teachers in May 2003. Its members created the inaugural Student Growth Plans and curriculum for Year 7, which is a significant part of the reinvention. A focus group will allow fuller exploration of ideas and issues.</li> <li>The Strategy Core Team consisted in December 2003 of five people, including the Principal. Chaired by the DoPL, this group is ongoing, and responsible for strategy process and communication associated with the reinvention.</li> <li>The registrar has significant formal and informal contact with the current parent body, local community and prospective parents.</li> <li>The Director of Administration's role includes HR: she is aware of why staff leave and why new staff are attracted to apply for positions at the school. One-on-one interviews with the registrar and the Director of Administration would offer more control to the participants, enabling them to contribute information that the researcher may not have anticipated or expected.</li> </ol>	<ol style="list-style-type: none"> <li>Involving all Year 12 students makes it more likely that the full spectrum of perspectives is accessed. A survey offered to all permits this, although there is less opportunity for elaboration or explanation. This survey is part of the regular annual procedure at the school.</li> <li>Students from Years 8-12 will experience the new learning paradigm (which is the outcome of the reinvention) in only indirect ways, as their teachers incorporate new pedagogical insights into the teaching/learning process. Their curriculum and school structures will be only moderately changed. In 2003 some Year 11 students were trained to lead focus groups of students in order for the school to ascertain what students wished to know about the strategy. 25% of the focus group will be comprised of students with such training and experience, as they will have a broader understanding of the issues through their experience of leading a focus group. Focus groups of students are a regular feature of the life of the school. Use of focus group methodology is preferred to class discussions (a methodology which the researcher also considered, but rejected) because there will be no pre-existing dynamics within the group, as there would be in a class group. The size of a focus group will also allow all participants to contribute, which would not be possible in a whole class discussion.</li> <li>Year 7 2004 students are the first cohort to have experienced the new learning paradigm and the structures to support it. At the time of the focus group they will have been part of the school for less than one term. Nevertheless, they have visited the school several times before beginning Year 7, including an interview in November 2003 with their Year 7 Advisor and orientation days. Some will also have older siblings at Loreto Normanhurst or at other schools and thus have a basis for comparison. It will be first impressions of the new paradigm that will be captured from the first group of students to experience it. Focus group methodology will be used for the reasons outlined above.</li> </ol>	<ol style="list-style-type: none"> <li>All parents with daughters beginning at the school, finishing compulsory education, or finishing at the school. Involving all parents with daughters at these Year levels makes it more likely that the full spectrum of perspectives is accessed. A survey offered to all permits this, although there is less opportunity for elaboration or explanation. This survey is part of the regular annual procedure at the school.</li> <li>The P&amp;F Executive is a group of parents who work to promote community, uphold the school's values and support the work of the school. This group is likely to be in touch with what is happening in the school and the views of parents generally. Focus group methodology enables deeper exploration of issues; participants are able to explain their views and reasons for these more fully.</li> <li>This group will have experienced the changes within the school from before the first lay Principal arrived and before the first Strategic Plan was developed in 1994. They will therefore offer a longitudinal perspective. Focus group methodology will be used for the reasons outlined above.</li> <li>This group will have the most at stake, as their children will be the first to experience the new educational paradigm and to have Student Growth Plans developed for their ongoing development. As parents, they will be expected to be highly involved in their daughters' growth and learning. Although they will have been parents of Year 7 students for only a short time, this group of parents had many contacts with the school prior to their daughters' starting at Loreto Normanhurst. These included 3 information sessions, Open Day, enrolment interview and the interview with their daughter and her Advisor in November 2003. Some will also have older daughters at Loreto Normanhurst or at other schools and thus have a basis for comparison. Focus group methodology will be used for the reasons outlined above.</li> </ol>	<p>The School Council is responsible for ensuring that the school's core values are upheld and for its ongoing health and viability. Focus group methodology enables deeper exploration of issues; participants are able to explain their views and reasons for these more fully.</p>
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<p><b>What?</b></p> <p>What specific insights are these participants likely to offer?</p>	<ol style="list-style-type: none"> <li>1. general attitudes across the whole staff</li> <li>2. as above. This survey will be more specific to the research questions, however. Staff will be free to answer or not. The research will not be present to note if staff members leave rather than complete it.</li> <li>3. from those teachers who express willingness to be further involved in the research, a stratified random sample will be gathered to form a focus group.</li> <li>4. from those non-teaching staff members who express willingness to be further involved in the research, a stratified random sample will be gathered to form a focus group.</li> <li>5. the Implementation Team consists of volunteer teachers chosen for their skills and enthusiasm for the strategy. Members will have understood the issues and be able to provide an informed response.</li> <li>6. the Year 7 2004 Team consists of volunteer teachers, 6 from within and 2 from outside the school, who wish to work in the new paradigm with Year 7 2004.</li> <li>7. the Strategy Core Team has expanded from the Principal/researcher and one other in 2000 to six (then five) members in 2003. It is responsible for strategy process and communication.</li> <li>8. the registrar will be able to comment on how current/prospective parents feel about the reinvention; how it is perceived in the wider community; whether enrolment has been affected by the reinvention.</li> <li>9. the Director of Administration has contact with new and prospective staff members and conducts exit surveys and interviews. This gives her insight into why staff are coming to or leaving the school.</li> </ol>	<ol style="list-style-type: none"> <li>1. general attitudes across all Year 12 students.</li> <li>2. representative views of students across Years 8 to 12.</li> <li>3. representative views of students who are experiencing the start of the new educational paradigm, which is the fruit of the reinvention.</li> </ol>	<ol style="list-style-type: none"> <li>1. general attitudes across half the parent body</li> <li>2. this group, as parents who commit large amounts of time and energy to the school, and who are in relatively close contact with members of the school Leadership Team, is likely to be well informed about the reinvention. At the same time, they are likely to know the mind of the broader parent body</li> <li>3. this group will have been part of the school before the inception of the reinvention process. They will therefore be able to comment on the background to the case study, providing a means of measuring the degree of change achieved by the school.</li> <li>4. this group knew of the planned changes before they accepted a place for their daughter. They will have attended/ or been invited to several information sessions offered by the school. The fact that they have continued with the enrolment indicates a certain level of confidence, yet this group is may raise many concerns and fears.</li> </ol>		
<p><b>When?</b></p>	<ol style="list-style-type: none"> <li>1. November, 2002 and 2003</li> <li>2. January, 2004</li> <li>3. February, 2004</li> <li>4. February, 2004</li> </ol>	<ol style="list-style-type: none"> <li>1. January, 2003 and 2004</li> <li>2. February, 2004</li> <li>3. March, 2004</li> </ol>	<ol style="list-style-type: none"> <li>1. October, 2003</li> <li>2. March, 2004</li> <li>3. March, 2004</li> <li>4. March, 2004</li> </ol>	<p>February, 2004</p>	<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Appendix 8 (contd)</p>

5. February, 2004			
6. February, 2004			
7. February, 2004			
8. February, 2004			
9. February, 2004			

	Strategy Team	Loreto sisters (IBVM)	External Strategy process facilitator (AD)
<b>Who?</b>	All members. The Strategy Team was established at the end of 2000 with a membership of 17 people. In 2004 it consists of 23 people: the eleven members of the school's Leadership Team and representatives of parents, past parents, ex-students, IBVM, Council, and both teaching and non-teaching staff. In 2001 and 2002 it was a decision-making body; however, from 2003 it has been advisory to the reinvention process. Since 2000 there has been considerable turnover of membership: the previous IBVM member died, external pressures have affected others, causing their resignation from the Team, and others still have left the school or the Council.	<ol style="list-style-type: none"> <li>1. Director of the Loreto Education Office. It is through this Office, established in the late 1990s, that the IBVM administer and oversee the work of their schools in Australia.</li> <li>2. IBVM member (included within the Strategy Team)</li> <li>3. IBVM member (included within the Critical Panel)</li> </ol>	External facilitator to the strategy process  AD, appointed in September 2000, has worked with the school on an ongoing consultancy basis.
<b>How?</b>	Focus group (conducted by external facilitator; audio-taped and transcribed; researcher access to transcripts only.)	<ol style="list-style-type: none"> <li>1. Interview (conducted by the researcher; audio-taped and transcribed.)</li> </ol>	<ol style="list-style-type: none"> <li>1. Written report by facilitator AD</li> <li>2. Interview (conducted by the researcher; audio-taped and transcribed)</li> </ol>
<b>Why?</b> Why choose this sample?  Why choose this method of data gathering?	The Strategy Team represents the voices of various sectors of the school community and communicates with those sectors. From its inauguration at the end of 2000 until the end of 2002 this group made decisions (to be ratified by the School Council) regarding the future education to be offered by the school. From the end of 2002 it became an advisory body. This Team has unique insights into the processes of reinvention and the perspectives of a range of community members. A focus group will enable members to build on others' ideas, thereby constructing meaning. It is envisaged that focus group process will be similar to the way that this group, of which the researcher is a regular member, usually functions when working with the external facilitator. The researcher will not be present during the focus group, however.	As the carriers of the charism of the Institute of the Blessed Virgin Mary, present-day Loreto sisters have a major concern for the values of the school, and the type of education it offers. As the owners of the school, the Loreto sisters exercise control over it, through the School Council, the governing body. The Director of the Loreto Education Office is the Loreto sister with the closest connection to all the education works of the Order in Australia. An individual interview enables greater opportunities for exploration of issues and themes at a deeper level.	AD brings a degree of objectivity while being closely involved with the process, particularly in 2001. He works chiefly with business organisations, and also with one other school, and therefore has the opportunity to compare processes and effects. A written report will enable AD to reflect on issues at a distance. This would be completed before the interview to facilitate objectivity. An individual interview will enable greater opportunities for exploration of issues and themes identified in the report at a deeper level.
<b>What?</b> What insights are these participants likely to offer?	This group is likely to have the most accurate corporate memory of the steps in the reinvention process, of how decisions were arrived at, and of the impact of and on the school community.	Since the aim of the reinvention process is to translate the values of the foundress of the IBVM, Mary Ward, into the 21 <sup>st</sup> century, the reactions and attitudes of her followers, the Loreto sisters, are of pivotal importance in assessing whether the reinvention is successful.	The external facilitator's objectivity, and the comparative data to which he has access, will provide unique insights into the reinvention process.
<b>When?</b>	February, 2004	March, 2004	March, 2004

## Draft timeline for collection of data

Type	Timing	Respondents	Collector	Date
Researcher journal	January 2001 – April 2004		LMD	
Document/ artefact analysis	April 1994 – April 2004		LMD	
Surveys	October 2002, October 2003	Annual survey of parents of all Year 7,10 and 12 students	DoPL	
	November 2002, October 2003	Annual survey of all staff	DoPL	
	January 2003, January 2004	Annual exit survey of all Year 12 students	DoPL	
Interviews/ focus groups	January 2004	Survey of all (volunteer) staff	LMD	Tuesday 27
	February 2004	Focus group: School Council	LMD	Sunday 8
	February 2004	Interviews (4): Strategy Core Team members	External	Mon 16
	February 2004	Focus group: Implementation Team	External	Tues 17
	February 2004	Interview: Registrar	External	Tues 17
	February 2004	Interview: Director of Administration	External	Tues 17
	February 2004	Focus group: Year 7 2004 Team	External	Tues 17
	February 2004	Focus group: Students from Years 8 – 12	LMD	Wed 18
	February 2004	Focus group: Strategy Team (community members & Leadership Team)	External	Thurs 19
	February 2004	Focus group: Teaching staff	External	Thurs 19
	February 2004	Focus group: Non-teaching staff	External	Thurs 19
	February 2004	Focus group: P&F Executive	LMD	Mon 23(pm)
	March 2004	Focus group: Parents of students across 1994-2003	LMD	Tues 1 (pm)
	March 2004	Interview and written report by strategy process facilitator AD	LMD	Mon 8
	March 2004	Focus group: Parents of Year 7 2004 students	LMD	Mon 8 (pm)
March 2004	Focus group: Year 7 2004 students	LMD	Wed 10	
March 2004	Interview: Director of the Loreto Education Office (Loreto sisters)	LMD	Tues 16	

Appendix 8 (contd)

### Appendix 9: Criteria for selection of focus group members

#### Criteria for selection of focus groups

##### **Teaching staff**

- All must be volunteers (have submitted forms)
- Male/female balance 20:80 (to approximately reflect the gender balance on staff)
- Balance across faculties, no more than 2 from any one faculty
- Balance of longer-serving/ new staff
- Balance of part-time/ full-time staff
- Balance of those in/ not in middle management positions
- Balance of more experienced/ less experienced teachers
- Excluded: members of Year 7 Team/ Implementation Team/ Strategy Team/ Strategy Core Team/ Verity Committee (as they will form part of separate focus groups or interviews)
- Balance of staff who have been/ have not been involved in earlier task forces and teams

##### **Non-teaching staff**

- All must be volunteers (have submitted forms)
- Male/female balance 20:80 (to approximately reflect the gender balance on staff)
- Balance across boarding/ school support/ grounds & maintenance 4: 4: 2 (to approximately reflect the balance on staff)
- Balance of longer-serving/ new staff
- No overlap of members of Strategy Team/ Verity Committee (as they will form part of separate focus groups or interviews)

##### **Year 7 2004 Parents**

- Balance of boarding/ day girl parents 20:80 (to approximately reflect the balance in student population)
- Balance across geographical areas Upper North Shore/ Hills District/ Main North Line 3:3:3 (to approximately reflect the balance in student population)
- Balance of parents new to the school and those with daughters at Loreto Normanhurst already 50:50

##### **Parents with daughters in the school from 1994 –2003**

There are approximately 30 families who meet this criterion. Selection to be based on proportional balance of:

- boarder/daygirl parents
- male and female parents

##### **Year 8-12 students**

- Balance of boarding/ day girls 20:80 (to approximately reflect the balance in student population)
- Balance across geographical areas Upper North Shore/ Hills District/ Main North Line 3:3:3 (to approximately reflect the balance in student population)
- Balance of academically able/ less able (as determined by Mary Lane, Head of Learning Support at Loreto Normanhurst)
- 50% of membership to be student leaders of 2003 focus groups
- Balance of students with no direct connection with Year 7 2004 and those with a sister in Year 7 2004

##### **Year 7 students**

- Balance of boarding/ day girls 20:80 (to approximately reflect the balance in student population)
- Balance across geographical areas Upper North Shore/ Hills District/ Main North Line: 3:3:3 (to approximately reflect the balance in student population)
- Balance of academically able/ less able (as determined by Mary Lane, Head of Learning Support at Loreto Normanhurst)
- Balance of students whose families are new to the school and those with sisters at Loreto Normanhurst already: 50:50.

**Appendix 10: Staff survey instrument, January 2004**

**Loreto Normanhurst Staff survey**

A. Please indicate the sector of staff in which you work:  
(by placing a tick in the appropriate box)

Boarding	<input type="checkbox"/>
School support	<input type="checkbox"/>
Grounds and maintenance	<input type="checkbox"/>
Teaching	<input type="checkbox"/>
HoD/ House Coordinator	<input type="checkbox"/>
Leadership Team	<input type="checkbox"/>

B. How long have you been employed at Loreto Normanhurst?

Less than 2 years	<input type="checkbox"/>
Between 2 and 5 years	<input type="checkbox"/>
Between 5 and 10 years	<input type="checkbox"/>
Between 10 and 15 years	<input type="checkbox"/>
More than 15 years	<input type="checkbox"/>

C. What is the length of your total teaching experience? (*teachers only*)

Less than 2 years	<input type="checkbox"/>
Between 2 and 5 years	<input type="checkbox"/>
Between 5 and 10 years	<input type="checkbox"/>
Between 10 and 15 years	<input type="checkbox"/>
More than 15 years	<input type="checkbox"/>

D. Have you been involved in a task force, team or committee specifically connected with the Strategy process? (*teachers only*)  
(please circle the appropriate response) YES / NO

E. Are you MALE / FEMALE ?

**Question 1 Experience of the process**

Reinvention is major change. People respond in different ways to this.

- a. *How have YOU experienced the reinvention process? What has it been like to be part of a reinventing school?*
- b. *Do you have a feel for how the reinvention process affected other people?*
- c. *How do you see the role of teacher (or your own role) being different in the reinvented / reinventing Loreto Normanhurst? How do you feel about this?*
- d. *What is your personal view on how the school now sees itself?*

**Question 2 Leadership**

Leadership takes many forms and can be exercised by many people in an organisation.

- a. *What have you observed about leadership of the reinvention process? Who was involved? Was there anyone not involved who you would have expected to be?*

b. To what extent did YOU feel involved in the process?

Highly involved	
Somewhat involved	
Not sure	
Not very involved	
Definitely not involved	

c. Were you happy with this level of involvement?  
(You are welcome to make additional comments)

YES / NO

d. To what extent did YOU feel included in the process?

Highly included	
Included	
Neutral	
Not very included	
Definitely not included	

e. Were you happy with this level of inclusion?  
(You are welcome to make additional comments)

YES / NO

f. What role do you see that staff in general have played in the process? Are you happy with this level of involvement?

g. Can you draw any conclusions about leadership of the reinvention process?

### Question 3 Meeting the needs of the 21<sup>st</sup> century

You may or may not have had an association with Loreto Normanhurst in 1994. The school has changed much since then, and reinvention is an ongoing process.

To what extent do you think the school has succeeded so far in reinventing itself to meet the needs of girls at the start of the 21<sup>st</sup> century?

### Question 4 Mary Ward values

Loreto Normanhurst is a Catholic school, based on gospel values, with the person of Jesus as its centre. It is also a school in the Loreto tradition, based on the vision and values of Mary Ward, and her efforts to live a “praiseworthy Christian life in the world”. In your information pack you would have found a document which summarises the vision and values of a Catholic school in the Mary Ward tradition.

The Loreto Normanhurst Strategy is attempting to connect the needs of young women, in a different and changing world at the start of the 21<sup>st</sup> century, with these enduring values and this vision. The Loreto Normanhurst Strategy document names this as the need to “continually reinvent the school, translating Mary Ward’s values into the 21<sup>st</sup> century.”

a. In your view, in what way/s (if any), is Loreto Normanhurst truer to its purpose as a school in the Mary Ward tradition because of what we have done through the reinvention?

b. In remaining true to Mary Ward’s values the school would need to:

- avoid introducing anything that would be in conflict with Mary Ward’s values

- identify any gaps that might exist between those values and how they are lived, and then address them
- avoid losing what it had that was true to those values.

*Is anything **not** in keeping with Mary Ward's values in what has been done through the reinvention?*

**Question 5                      Learnings**

*a. From your point of view, what helped the school to change itself?*

- i*
- ii*
- iii*

*b. From your point of view, what made it hard for the process to move ahead?*

All change and development offers opportunity for learning – learning from what went well and from mistakes made.

*c. What do you think we can learn from this process?*

Are there any other comments that you would like to make?

Thank you for taking the time to complete this survey.

[Researcher's Note:  
Significant amounts of space were allowed for participant responses to open-ended questions.]

**Appendix 11: Staff expression of interest *pro forma* for focus group membership, January 2004**

**Research into the reinvention process at Loreto Normanhurst**

**Expression of interest in being part of a focus group of staff**

As well as this survey, two focus groups – one comprised of teaching staff and the other of non-teaching staff – will be conducted in Term 1 this year.

Each of these focus groups will:

- be conducted by an independent, external researcher
- be tape-recorded and transcribed
- consist of about eight to ten staff
- be made up of randomly selected staff from particular groupings of those who volunteer
- last about one hour
- further explore the responses obtained from the staff survey.

Mary Lane, Chair of the Verity Committee, and Dr Ruth Shatford, Chair of the Critical Panel, will make the selection of groups.

The Principal/ researcher will have access only to the transcribed proceedings of the focus groups, not to the tapes themselves. This is in order to preserve confidentiality. Her university supervisors will keep the tapes.

**I am willing to be a volunteer in a focus group of staff.**

Name: (please print)

Signature:

Sector of staff:    teaching/ non-teaching                    (please circle)

Date:

**Appendix 12: Sample interview questions – teaching staff focus group interview, February 2004**

**Research into the reinvention process at Loreto Normanhurst 1994 - 2004**

**Focus group interview questions**

**Teaching Staff**

(external researcher conducts this focus group)

**Welcome and preamble**

**(5 minutes)**

**1.**

Reinvention is major change, and ongoing change. As I understand it, the intention of the strategy process at Loreto Normanhurst is that the school becomes a reflective learning community that constantly evolves, continually reinventing itself. People respond in different ways to this.

- a. *From your perspective, what has it been like to be part of a reinventing school?*
- b. *Do you have a feel for how the reinvention process affected other people?*
- c. *What role do you see that staff have played in the process? Was this the right level of involvement?*
- d. *How do you see the role of teacher being different in the reinvented/ reinventing Loreto Normanhurst? How do you feel about this?*
- e. *How will being a student at Loreto Normanhurst be different now? How do you feel about this?*
- f. *What do you see as the role of parents in the reinventing school?*
- g. *What is **your** view on how the school now sees itself*
- h. *What strengths/ weaknesses do you see in how the school now sees itself?*

**(20 minutes)**

**2.**

Leadership takes many forms and can be exercised by many people in an organisation or community.

- a. *What have you observed about the leadership of the reinvention process? Who was involved? Who was not involved in this leadership?*
- b. *How have you personally felt involved in leadership of the reinvention process?*
- c. *Can you draw any conclusions about leadership of the reinvention process?*

**(10 minutes)**

**3.**

In your information pack you would have found a document which summarises the vision and values of a Catholic school in the Mary Ward tradition. The Loreto Normanhurst Strategy is attempting to connect the needs of young women, in a different and changing world at the start of the 21<sup>st</sup> century, with these enduring values and vision. The Loreto Normanhurst Strategy

**Appendix 12 (contd)**

document names this as the need to “continually reinvent the school, translating Mary Ward’s values into the 21<sup>st</sup> century.”

- a. *In your view, is Loreto Normanhurst truer to its purpose as a school in the Mary Ward tradition because of what we have done through the reinvention?*
- b. *Is anything not in keeping with Mary Ward’s values?*

*(Think about the processes through which the changes came about as well as the changes themselves.)*

**(5 minutes)**

**4.**

You may or may not have had an association with Loreto Normanhurst in 1994. The school has changed much in this time, and reinvention is an ongoing process.

*To what extent do you think the school has succeeded thus far in reinventing itself to meet the needs of girls at the start of the 21<sup>st</sup> century?*

**(5 minutes)**

**5.**

- a. *From your point of view, what three things helped the school to change itself?*
- b. *From your point of view, what made it hard for the reinvention process to move ahead?*

All change and development offers opportunity for learning – learning from what went well and from mistakes made.

- c. *What do you think we can learn from this process?*

*Are there any general comments you would like to make?*

**Thanks and conclusion.**

**(15 minutes)**

**Total: 60 minutes**

## Appendix 13: Excerpt from coding, NVivo node listing, 12 June 2004

NVivo revision 2.0.161

Licensee: Leoni Degenhardt

Project: Reinventing a school    User: Administrator    Date: 12/06/2004 - 9:31:30 AM

**NODE LISTING**

**Nodes in Set:**    All Nodes  
**Created:**        18/04/2003 - 11:07:52 AM  
**Modified:**       12/06/2004 - 9:29:04 AM  
**Number of Nodes:**    127

- 1        **(1) /context**
- 2        **(1 1) /context/external organisations**
- 3        (1 1 1) /context/external organisations/**Board of Studies**
- 4        (1 1 2) /context/external organisations/**Church**
- 5        (1 1 3) /context/external organisations/**education community**
- 6        (1 1 4) /context/external organisations/**local community**
- 7        (1 1 9) /context/external organisations/**union**
- 8        (1 2) /context/internal conditions
- 10       (1 2 1 2) /context/internal conditions/**organisational sagas/IBVM stories**
- 11       (1 2 1 3) /context/internal conditions/**organisational sagas/~golden age~ myth**
- 12       (1 2 3) /context/internal conditions/**past history of change**
- 13       (1 2 4) /context/internal conditions/**relationship with IBVM**
- 14       (1 2 7) /context/internal conditions/**relationship with School Council**
- 15       (1 2 8) /context/internal conditions/**culture**
- 16       (1 2 8 1) /context/internal conditions/culture/**sense of tradition**
- 17       (1 2 8 2) /context/internal conditions/culture/**staff stability**
- 18       (1 2 8 10) /context/internal conditions/culture/**teacher culture**
- 19       (1 2 8 12) /context/internal conditions/culture/subterranean culture
- 20       (1 2 11) /context/internal conditions/**structures**
- 21       (1 2 11 1) /context/internal conditions/structures/**roles**
- 22       (1 2 11 2) /context/internal conditions/structures/**working in teams**
- 23       **(1 3) /context/big picture**
- 24       (1 3 1) /context/big picture/**technology issues**
- 25       (1 3 2) /context/big picture/**social issues**
- 26       (1 3 3) /context/big picture/**social justice issues**
- 27       (1 3 5) /context/big picture/**global issues**
- 28       (1 3 7) /context/big picture/**legal issues**
- 29       (1 3 8) /context/big picture/**political issues**
- 30       **(2) /tensions**
- 31       **(2 1) /tensions/risk**
- 32       **(2 4) /tensions/implementation issues**
- 33       (2 4 13) /tensions/implementation issues/**inclusion**
- 34       (2 4 21) /tensions/implementation issues/**leadership of the change**
- 35       (2 4 27) /tensions/implementation issues/**communication**
- 36       (2 4 31) /tensions/implementation issues/**transition management**
- 37       (2 4 35) /tensions/implementation issues/**day to day issues**
- 38       (2 4 39) /tensions/implementation issues/**understanding of the concept**
- 39       (2 4 42) /tensions/implementation issues/**impact on staff**
- 40       **(2 5) /tensions/shared vision for the future**
- 41       **(2 12) /tensions/resources**
- 42       (2 12 1) /tensions/resources/**money**
- 43       (2 12 7) /tensions/resources/**buildings**
- 44       (2 12 8) /tensions/resources/**time**
- 45       **(2 14) /tensions/relationships**
- 46       (2 14 5) /tensions/relationships/**trust**
- 47       (2 14 23) /tensions/relationships/**gap between LT and staff**

48	<b>(2 19) /tensions/staff attitudes and commitment</b>
49	(2 19 2) /tensions/staff attitudes and commitment/ <b>industrial issues</b>
50	(2 19 6) /tensions/staff attitudes and commitment/ <b>perfectionism</b>
51	(2 19 36) /tensions/staff attitudes and commitment/ <b>attitude to change</b>
52	<b>(2 20) /tensions/support</b>
53	<b>(2 22) /tensions/power</b>
54	<b>(2 26) /tensions/gender</b>
55	<b>(2 29) /tensions/principal as researcher</b>
56	<b>(2 30) /tensions/perceptions of the school</b>
57	<b>(3) /events</b>
58	(3 1) /events/ <b>1999 planning the process for the process</b>
59	(3 2) /events/ <b>preparation for strategy</b>
60	(3 3) /events/ <b>developing the strategy</b>
61	(3 6) /events/ <b>GK leaving Imp Team</b>
62	(3 7) /events/ <b>Sue Johns' leaving</b>
63	<b>(4) /methodology</b>
64	<b>(5) /values</b>
65	(5 1) /values/ <b>Mary Ward values</b>
66	(5 3) /values/ <b>Catholic~gospel values</b>
67	(5 4) /values/ <b>strategy values</b>
68	(5 9) /values/ <b>individual~community</b>
69	<b>(6) /leadership</b>
70	(6 1) /leadership/ <b>inclusive leadership</b>
71	(6 2) /leadership/ <b>Principal reflections on role</b>
72	(6 5) /leadership/ <b>role of Principal in process</b>
73	(6 6) /leadership/ <b>servant leadership</b>
74	(6 7) /leadership/ <b>shared leadership</b>
75	<b>(7) /personal responses</b>
76	(7 1) /personal responses/ <b>positive</b>
77	(7 2) /personal responses/ <b>ambivalent</b>
78	(7 3) /personal responses/ <b>negative</b>
79	(7 15) /personal responses/ <b>degree of involvement</b>
80	(7 15 1) /personal responses/degree of involvement/ <b>not very involved</b>
81	(7 15 2) /personal responses/degree of involvement/ <b>somewhat involved</b>
82	(7 15 3) /personal responses/degree of involvement/ <b>highly involved</b>
83	(7 15 4) /personal responses/degree of involvement/ <b>definitely not involved</b>
84	<b>(8) /literature</b>
85	<b>(12) /indicators~outcomes</b>
86	(12 1) /indicators~outcomes/ <b>student growth plans</b>
87	(12 2) /indicators~outcomes/ <b>Mary Ward values evident</b>
88	(12 5) /indicators~outcomes/ <b>meeting 21st C learning needs</b>
89	(12 6) /indicators~outcomes/ <b>too early to tell</b>
90	(12 7) /indicators~outcomes/ <b>capacity building</b>
91	(12 11) /indicators~outcomes/ <b>casualties to staff~students</b>
92	<b>(13) /players</b>
93	(13 1) /players/ <b>Adrian Dart</b>
94	(13 2) /players/ <b>principal</b>
95	(13 3) /players/ <b>Leadership Team</b>
96	(13 4) /players/ <b>non-teaching staff</b>
97	(13 5) /players/ <b>parents</b>
98	(13 6) /players/ <b>students</b>
99	(13 7) /players/ <b>School Council</b>
100	(13 8) /players/ <b>teaching staff</b>
101	(13 9) /players/ <b>IBVM</b>
102	(13 10) /players/ <b>external interviewer</b>
103	(13 11) /players/ <b>Verity Committee</b>
104	(13 12) /players/ <b>deputy principal</b>
105	(13 13) /players/ <b>DoPL</b>
106	(13 14) /players/ <b>Critical Panel</b>
107	(13 15) /players/ <b>external researcher</b>
108	(13 16) /players/ <b>HoDs</b>
109	(13 17) /players/ <b>Strategy Team</b>
110	(13 18) /players/ <b>Strategy Core Team</b>

## Appendix 13 (contd)

111	(13 19) /players/Implementation Team	
112	(13 20) /players/Year 7 2004 Team	
113	(13 21) /players/other task force members	
114	(13 22) /players/ex-students	
115	(13 23) /players/'I'	
116	(13 24) /players/HoDs	
117	<b>(17) /polarity_ impact</b>	
118	(17 1) /polarity_ impact/helps	
119	(17 9) /polarity_ impact/ <b>polarised views</b>	
120	(17 10) /polarity_ impact/ <b>hinders</b>	
121	<b>(19) /strategies</b>	
122	<b>(40) /questions</b>	
123	(40 2) /questions/Question 1	Experience of process
124	(40 3) /questions/Question 2	Leadership
125	(40 4) /questions/Question 3	Mary Ward values
126	(40 5) /questions/Question 4	Needs of the 21stC
127	(40 6) /questions/Question 5	Learnings

**Appendix 14: Gantt chart of events in the reinvention process, 1999-2004**

**1999 – 2000**

Action	1999	Term 1, 2000	Term 2, 2000	Term 3, 2000	Term 4, 2000
Conclusion of 'Future Directions' – document published	■				
Staff Scholarship winner, Mary Lane, studies systems of organisational improvement in the UK	■				
Mary Lane reports to LT and Staff		■			
Mary Lane and LT study two more UK systems		■			
LT develops new strategy process		■			
Adrian Dart speaks to LT re: Strategic process		■			
Discussions about Strategic processes at School Council Meetings		■			
School Council endorses Strategic process			■		
LT endorse LMD and N Mockler to steer strategy process					■
Surveys of staff and students					■
Student focus groups run by N Mockler					■
Establishment of the Strategy Team					■
Annual Staff Survey – includes questions about strategy					■
Adrian Dart appointed as strategy facilitator					■

Appendix 14

2001

Action	Summer 00/01	Term 1, 2001	Term 2, 2001	Term 3, 2001	Term 4, 2001
Preparation for Strategy Workshop - overall process, strategic perspective and survey data analysis	█				
"School of the Future" Workshop		█			
Development of draft strategy by Strategy Team - February 2001		█			
Draft strategy document presented to School Council		█			
Boarder Parent Committee Meeting - strategy discussion		█			
Parent, Ex-Student, School Council and IBVM reps join Strategy Team		█			
Extensive consultation with stakeholders		█			
Explanation of strategy to students at assemblies			█	█	
Parent & Boarder Parent Strategy Workshops			█	█	
Final strategy developed by Strategy Team - Lock-In Workshop - June 2001			█		
Sr Diaan Stuart IBVM attends a strategy workshop			█		
Format for employment ads changed to include Intent			█		
Final strategy shared with all staff				█	
Final strategy endorsed by School Council				█	
Principal's Annual Teacher Reflections - include strategy discussion				█	
Whooping Cough Epidemic - new ways of learning				█	
Chair of Council gives workshop on strategy to Chairs of Council of other Loreto Schools				█	
Strategy FAQ board and e-mail address on Internet				█	
Strategy Core Team formed - L. Degenhardt, B. Watkins, N. Mockler				█	
Strategy updates at School Council meetings and Teaching Staff meetings				█	
Regular strategy communication in Weekly Newsletter				█	
Communication of <i>...growing individuals and communities...</i> to school community				█	
Development of ISGPs begins				█	
Models for ISGPs called for from any interested staff				█	

2001 cont.

Action	Summer 00/01	Term 1, 2001	Term 2, 2001	Term 3, 2001	Term 4, 2001
Models for ISGPs presented and evaluated					
ISGP taskforce formed – made up of volunteer staff					
Change management workshops for staff					
Regular strategy update e-mail from BAW					
Presentation of first draft of ISGP to staff in last week of Term 4					
Strategy communicated in School Magazine and Loreto Life					
Student Council, Year 11 & Tutor Group Workshops					
Annual Staff Survey – includes questions about strategy					
Strategy Team Workshop - November 2001					

**2002**

Action	Term 1, 2002	Term 2, 2002	Term 3, 2002	Term 4, 2002
Evaluation of ISGP draft model				
ISGP Taskforce 2 appointed from volunteers				
Taskforce 2 presents refined model of ISGPs				
Strategy Core Team meet weekly - LMD, BAW, NNM, AC and LS				
Strategy updates at School Council meetings and Teaching Staff meetings				
Regular strategy update e-mail from BAW				
Regular Strategy Communication in Weekly Newsletter				
Strategy FAQ Board & e-mail address on Internet				
Parent Assoc. Rep, Margaret Beck, on Strategy Team				
New Ex-student Association, School Council, IBVM, Staff and Parent reps join Strategy Team				
LMD announces decision to document strategy process as her PhD research				
Staff Scholarship focus changed to strategy				
School Council Planning Weekend - Strategy Discussions				
Development of Draft ISGPs				
Induction of new staff to strategy				
EQ Staff Day				
Strategy Team Lock-In Workshop - June 2002 - ISGPs re-named 'Student Growth Plans'				
Structure Taskforce of volunteers appointed				
Continuation of Change Management Workshops				
Appointment of Director of Mission				
Parent and Student Workshops				
Skill Development for SGPs				
Principal's Annual Teacher Reflections - include strategy discussion				

**2002 cont.**

Action	Term 1, 2002	Term 2, 2002	Term 3, 2002	Term 4, 2002
Gantt Chart for <i>...growing individuals and communities...</i>				
Student Growth Plans Detailed				
New School Structure finalised				
Budget to School Council				
Strategy Team Lock-In Workshop - November 2002				
Student Growth Plans Communicated to staff				
PD Plan in Place				
Student Growth Plans Tool Prototyped				
November 2002 - Margaret Beck reports on Strategy and SGPs to P&F AGM				
Annual Staff Survey - includes questions about Strategy				
Annual Parent and Year 12 Exit Surveys include questions on Strategy				
Implementation Team formed and begin work				
Discussion of Fifth Dimension for Strategy Document				

**2003**

Action	Term 1, 2003	Term 2, 2003	Term 3, 2003	Term 4, 2003
Induction of new staff to Strategy 22 - 24 January 2003	■			
Academic Paper and Plain English Information about Strategy published	■			
Strategy Team Lock-In Workshop - February 2003	■			
Leadership Team to action plan transition support for Years 8 - 12	■			
Development of Financial Model to 2008	■			
Development of System to track past students	■			
Tightening of SGP Guidelines	■			
Presentation of Strategy at Year 7 2005 Parent Information Session	■			
Development of Year 7 Day and Year 7 Team Conditions	■			
Principal's Annual Teacher Reflections - include Strategy discussion	■	■	■	
Strategy Updates at School Council meetings and Teaching Staff meetings	■	■	■	■
Presentation of Year 7 Team information to teaching staff April 2003	■			
Development of Strategy Business Plan (costs relating to Year 7, 2004)	■			
Advertisement of Year 7 Team membership internally and externally - April 2003	■			
Allocation and refurbishment of Hall as Year 7, 2004 area	■	■	■	■
Development and approval of new Masterplan including new strategy-purpose buildings	■	■	■	■
Appointment of Year 7 2004 Team	■	■	■	■
Year 7 2004 Team begin working and planning for 2004	■	■	■	■
Strategy Team Meeting 25 June 2003	■	■	■	■
Principal's Annual Teacher Reflections - include Strategy discussion	■	■	■	■
Extraordinary Leadership Team Meeting 21 July 2003	■	■	■	■

**2003 cont.**

Action	Term 1, 2003	Term 2, 2003	Term 3, 2003	Term 4, 2003
Role of Pastoral Care Co-ordinator created				
Extraordinary School Council Meeting 15 September 2003 (including Committees of Council and LT) re progress of Hall refurbishment/ new Mornane				
DA for Community Use of Pool and Gym approved 17 September 2003				
School Council Meeting 22 September 2003 - Architect Terry O'Hanlon engaged to manage the Refurbishment of the Hall for Year 7, 2004				
School Council Meeting 22 September 2003 - Agreement to approach six architects to tender for the new Mornane project				
Tender Process for new Mornane architect				
Office arrangements for DoSL and DoSPC revised by LT				
Refurbishment of Hall begins Student Vacation Sept - Oct				
Tanner & Assoc. appointed as architects for new Mornane Project and decision taken to demolish old building and erect a new building.				
Gantt Chart developed to ensure all aspects of Year 7, 2004 covered				
Non-teaching staff Annual Appraisals include Strategy discussion				
Year 7 2004 Plenary Sessions				
Project Management Plan developed for Strategy Implementation 2003/2004				
Strategy Team Meeting 6 November 2003				
Year 7 Team Teachers' Aide appointed to commence employment in 2004				
Development of new system for recording student absentees (Dec)				
Implementation Team disbanded (Dec)				
Request made to Provincialate to name the Hall the Deirdre Rofe Centre				
Staff advised of plans to demolish and rebuild Mornane (Staff Day 8 Dec)				
MS SharePoint software purchased and installed (Summer vacation)				
Construction of Office for Pastoral Care Secretary (Summer vacation)				

**2004**

Action	Term 1, 2004	Term 2, 2004	Term 3, 2004	Term 4, 2004
Strategy Core Team disbanded March 2004 and Admin Team adopts this role				
Strategy Team Meeting 19 February 2004				
Strategy Evaluation Think Tank formed March 2004 and meets once per cycle all year				
Leoni Degenhardt takes on management of Year 7 Team as Team Director				
2004 8-Key Projects identified 3 February 2004				
Opening of Deirdre Rofe Centre March 2004				
Funding and plans for new Mornane approved by School Council 5 April 2004				
Funding and plans for Barry Wing Year 8 Space approved by School Council 5 April 2004				
Strategy Team meets in February, June and November				
Appointment of Year 7 and 8 Teams, 2005				
Board of Studies Inspection – Registration granted for 5 years				
Team Managers from within Year 7 and 8 Teams appointed				
Leoni Degenhardt continues as Year 7 Team Director in 2005 and Megan Pursche appointed as Year 8 Team Director in 2005				
Capital Appeal				
Development of programs for Year 7 and Year 8 2005				
Building commences of Barry Wing learning space				
Hornsby Council approves DA for new Mornane building				
School Council defers building new Mornane building				
Evaluation of implementation of LNSGM				
Leadership Team takes on role of Strategy Core Team and meets once per cycle				
Barry Wing and History Teaching staff relocated to Staff Rooms 2 and 3				
Leadership Team develop a project management matrix to manage the next stage of the Strategy				
Room 59 refurbished as Year 8 Team temporary staff room				

Appendix 15: Loreto Normanhurst 2001-2007 Strategy document

Loreto Normanhurst Strategy  
2001 – 2007



June 2001

## Introduction

Using the ground rule of 'what we say we do' our strategy was developed using this definition:

*'Vision directed at what we want to be, not how we'll get there'*

Prior to the first workshop with the strategy team a strategic perspective of Loreto Normanhurst was prepared and staff were asked to respond to a strategy questionnaire. Both of these were then presented and discussed at each of the workshops (the main messages emerging can be seen in Annexures 1 and 2)

## The future we foresee (see Annexure 3 for detailed impacts & implications)

Workshop delegates were asked to respond to the question

"How will the future of our industry be different?"

Four key areas of difference were identified as those with the most significant impact for our future:

- ICT will offer greater opportunities for flexible learning
- New styles of learning & the change in family dynamics call for new models of community
- Traditional structures of Church will become less defined
- Increased competition from alternative models/providers

## Reality

Taking all of the above into consideration, we are faced with these realities:

- we must reinvent Loreto Normanhurst
- relationships and learning will always be central
- we must create lifelong learners

## Intent

In order to take fullest advantage of the exciting environment we see developing over the next six years we determined that our intent would be:

***...growing individuals and communities...***

## Core Values

In implementing our strategy we will embrace & nurture these three core values:

- passionate creativity
- wisdom
- integrity

## Decision Logic

Almost daily Loreto is confronted with directional choices. Should we expand or reduce our range of services? Should we develop an entirely new range of services and/or products given the range of opportunities being opened up by IT? Should we look to broaden our services to include communities such as the economically disadvantaged? Should we widen our geographic net?

In order to answer questions such as these, we believe that we must always be looking at who we are here to serve. Given the emerging environment we foresee we believe we should be focussing strongly on serving the needs of selected communities. This will definitely require a more outward looking focus than we have had in recent years. We will select a limited number of communities & look for new & anticipated needs in these communities, as well as new ways of filling these needs

This means we must ensure that we have the requisite competencies to research the needs & trends within these communities & develop appropriate services, & maybe even products. We need a flexible culture fostered by an outward looking leadership approach.

## Future Focus

Communities	Services/Products	Geography
1. Students & Parents	Individual student growth plans	NSW
	Pastoral care of families	
	Parent education programs	
2. Social Justice	Outreach	Local National Global
	Leadership of church	
	Community education programs	
3. Education	Leadership	Local National Global

## Shaping

In order to implement our strategy successfully it is essential that we ensure that we have a far higher level of proficiency in the areas of:

- integrated individual learning programs
- emotional competence training
- support of staff
- leadership and management skills
- financing
- religious formation
- research & development
- communication with all stakeholders
- pedagogy - students & adults

## **Performance Guidelines**

Overarching performance guidelines will be set in these areas:

- % of non-fee, non-Government income to reach 25% by 2007
- 85% satisfaction levels of staff, students, parents, wider community by 2007
- tracking of past students

## **Annexures**

1. Main messages emerging from our strategic perspective
2. Main messages from our strategic survey
3. Impacts & implications of our four foresight factors
4. Action plans

### **Annexure 1**

#### **Strategic Perspective**

A fascinating & extensive cameo perspective was presented at workshops covering the development of IBVM/Loreto schools from the days of the founder Mary Ward right through to the present day. These main messages emerged:

- vision, creativity, & leadership characterise the history of Loreto
- innovation and risk-taking to achieve our vision is a strong part of our ethos
- commitment to encourage lifelong learning
- holistic education that produces women of faith & integrity is always the aim
- education for justice is the foundation
- stewardship of Loreto and Catholic tradition
- educating women for the future in a changing world

### **Annexure 2**

#### **Feedback from the strategy survey**

Feedback from student, staff, & parents was presented as a backdrop to the results of the strategy survey answered by staff in December 2000. These main messages emerged:

- need to reconceptualise the role of the staff
- high level of congruence with school values
- tension in understanding the relationships between Catholic and Loreto values
- satisfaction and belief in well rounded education in a happy environment
- flexibility & innovation across all areas is important
- ongoing need for staff development
- need to maintain and /improve student & staff happiness & satisfaction
- importance of IT

### Annexure 3

#### Impacts/Implications of the future we foresee

**1. ICT will offer greater opportunities for flexible learning**

- Changes in pedagogy will be required to take advantage of the opportunities offered by ICT
- Review of structures:
  - Individual learning programs
  - Physical environment
  - Timetable
  - Artificial learning boundaries (years,age)
  - Credentiailling
  - Multi-campus learning
  - Pastoral care
  - Financial
  - Support staff

**2. New styles of learning & change in family dynamics call for new models of community**

- School becomes a service provider for communities within & beyond the school with the aim of fostering connectedness and strengthening relationships
- Extended hours and access
- Need to revise employment conditions and structures
- The role of the teacher will change

**3. Traditional structures of Church will become less defined**

- There are greater opportunities for leadership for women educated in the Loreto tradition
- New forms (models) of worship which reflect an inclusive understanding of Church
- New forms of social justice within and beyond the community
- Community needs a strong understanding of their Catholic tradition
- 'Church' must be seen in its broadest sense – 'a welcoming community of faith'
- School community must engage in respectful dialogue and partnership with all stakeholders in the church
- Prayerful critical reflection will be essential
- School supports students (post-school) to find a supportive faith community

**4. Increased competition from alternative models/providers**

- Reflection and articulation of what we do well
- A commitment to respond innovatively to changed needs
- All staff are ambassadors able to preach what they practise
- Need to 'shout from the rooftop' about hope-driven (not fear -driven) education at Loreto Normanhurst

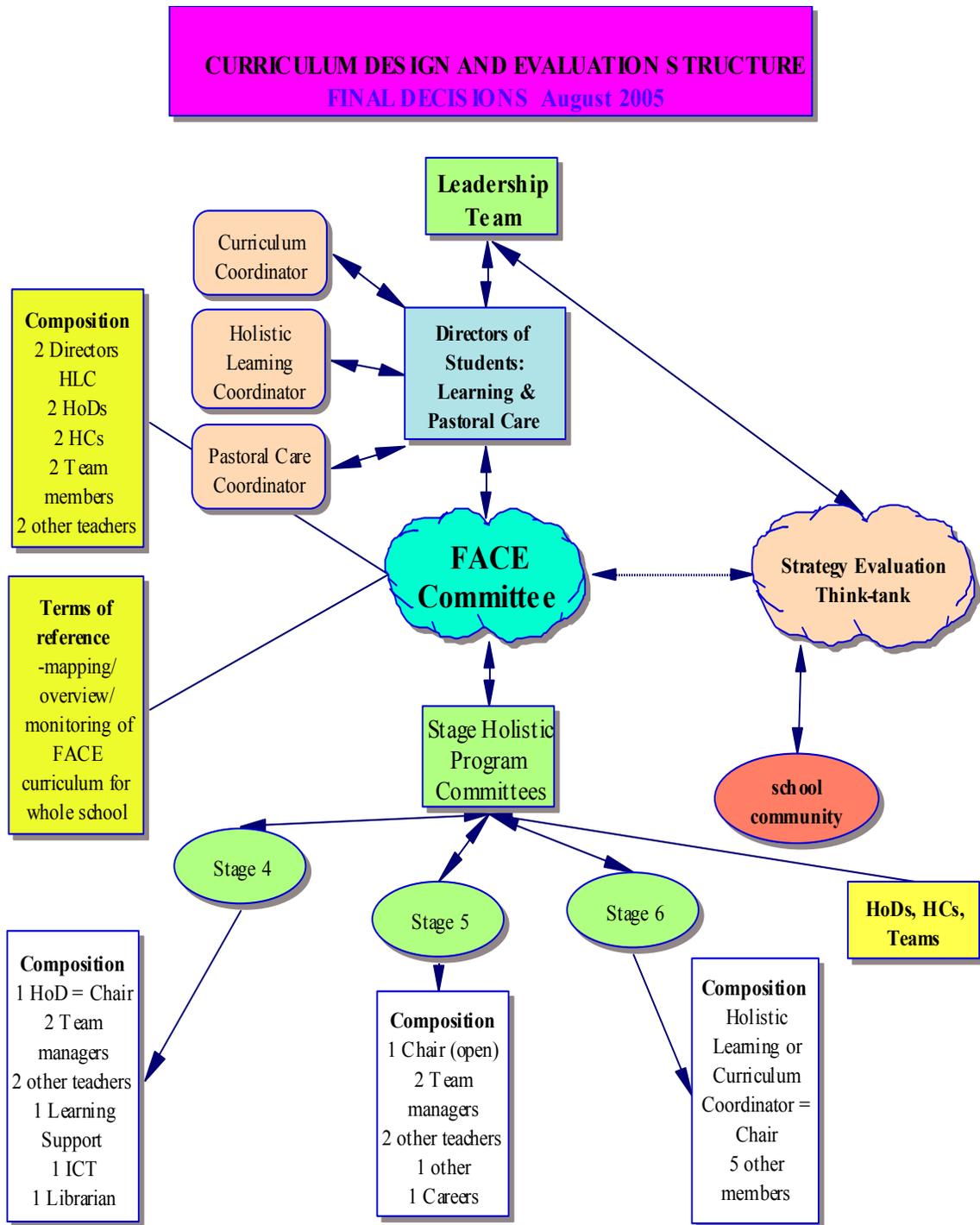
## Annexure 4

## Action Plans

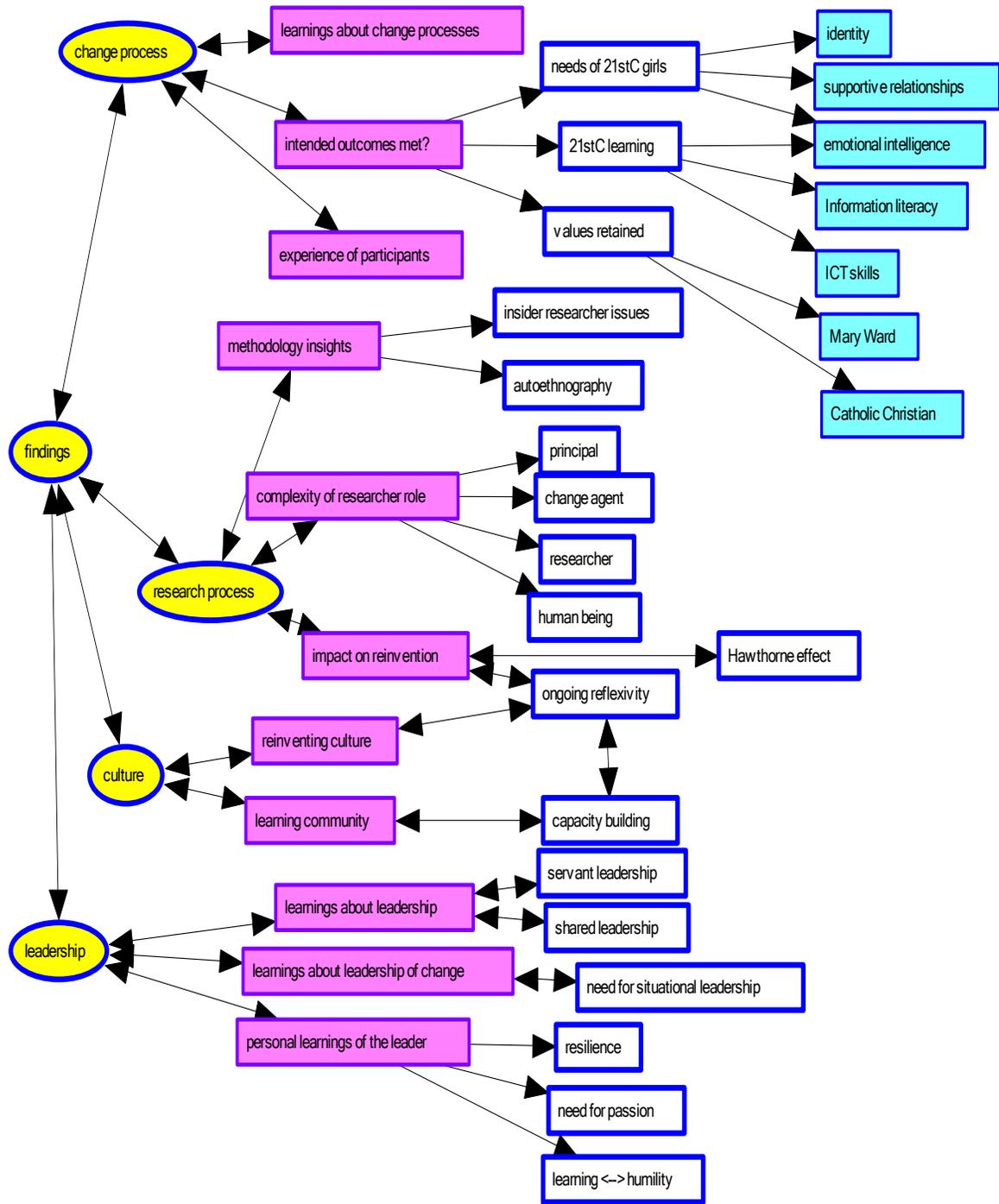
	<i>Led By</i>	<i>Start</i>	<i>Finish</i>
Strategy communicated to key stakeholders	LD	26 June	31 Aug
Strategy communicated	S Team	23 July	Ongoing
Process developed	All	27 July	6 August
Products & Services Defined	S Team	7 August	30 Sept
Budget revised	RH	23 July	30 Sept
Intent fleshed out	LD	23 July	Ongoing
Core values fleshed out	BW	26 June	20 July
Shaping elements actioned	L Team	23 July	30 Sept
Foresight elements fleshed out	L Team	23 July	30 Sept
Matrix fleshed out	NM	1 Oct	31 Oct
Performance guidelines fleshed out	MC	23 July	31 Oct

**Endorsed by Loreto Normanhurst School Council 24 July 2001**

Appendix 16: Curriculum Design and Evaluation Structure



Appendix 17: Final model of the findings of this study



Australian Catholic University  
Brisbane Sydney Canberra Ballarat Melbourne

**COPY FOR YOUR  
INFORMATION**



Human Research Ethics Committee  
Expedited Review  
Approval Form

Principal Investigator/Supervisor: Prof. Patrick Duignan	Campus: Sydney
Co-Investigators: Assoc. Prof. Deirdre Duncan	Campus: Sydney
Student Researcher: Mrs Leoni Degenhardt	Campus: Sydney

<p><b>Ethics approval has been granted for the following project:</b> Reinventing a school for the 21<sup>st</sup> century: a case study of change in a Mary ward school.</p> <p><b>for the period:</b> 09.2002 to 12.2003</p> <p><b>Human Research Ethics Committee Register Number:</b> N2002.03-19</p>
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subject to the following standard conditions as stipulated in the *National Statement on Ethical Conduct in Research Involving Humans* (1999):

- (i) that Principal Investigators / Supervisors provide, on the form supplied by the Human Research Ethics Committee, annual reports on matters such as:
  - security of records
  - compliance with approved consent procedures and documentation
  - compliance with special conditions, and
- (ii) that researchers report to the HREC immediately any matter that might affect the ethical acceptability of the protocol, such as:
  - proposed changes to the protocol
  - unforeseen circumstances or events
  - adverse effects on participants;

and subject to the following special conditions being met, as stipulated by the Human Research Ethics Committee:

**General Information**

- Please clarify details of the additional researcher, Ms Mockler, re information letter: "You will be asked to take part in a focus group, together with a number of other participants, which will be conducted by the Director of Professional Learning, Ms Nicole Mockler, and tape-recorded. I will be an observer in the focus group."

**Project Particulars**

- Due to power position of student researcher, targeted, if indeed purposive, invitations for focus groups etc should not be used. Participants may feel more at ease if all staff have been invited, and they can respond if interested.

**Gathering, security, disposal of data; dissemination of results**

- E2.2 Store data in a locked cabinet in Supervisor's office.

**Confidentiality, anonymity, privacy**

- Conflicting advice is contained in the Information letter regarding maintenance of confidentiality. ACU's HREC recommends maintenance of confidentiality for privacy reasons.

(Expedited Review Approval.dot @ 27.06.2002)

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- Since the student researcher is attending ACU and conducting the research, the primary point of call cited in the Information Letter for queries regarding ethical issues needs to remain as the Chair or Local Chair, ACU HREC. Accordingly, please remove or modify the following procedure and advice in the Information letter : "Since this research is not based on deeply personal issues, it is not anticipated that there will be any limits to confidentiality in this particular project. A Verity Committee has been set up within the school for the purposes of this research. This Committee will address, in confidence, any concerns that you may have about the research. Contact details for the Chair of the Verity Committee : Mrs Mary Lane, Ph: 02 9487 3488, Fax: 02 9489 2348, Email: mhlane@loretonh.nsw.edu.au".

**Information Letter to Participants**

- Please remove Res.services footer.
- Remove wording: "This letter is an invitation to participate in the research. You do not have to accept this invitation, and" and insert before "A and B" an invitation along the lines of "You are invited to take part in this research project which will involve two steps" (etc).
- Given above changes, paragraph three begins "You are free to refuse consent without..." etc.

**The Principal Investigator / Supervisor is requested to note the following comments:**

Within one month of the conclusion of the project, researchers are required to complete a *Final Report Form* and submit it to the local Research Services Officer.

If the project continues for more than one year, researchers are required to complete an *Annual Progress Report Form* and submit it to the local Research Services Officer within one month of the anniversary date of the ethics approval.

Signed: *M. Lane*  
(Chair, Expedited Review Panel, HREC)

Date: 17.10.02

<p><b>TO BE COMPLETED BY THE PRINCIPAL INVESTIGATOR OR BY THE SUPERVISOR AND STUDENT RESEARCHER</b></p> <p>The Principal Investigator, or the Supervisor and Student Researcher, are to sign, date and return this form to the local Research Services Officer. Evidence of compliance with any special conditions set by the HREC should be provided when the form is returned. Please note that data-collection must not commence until the stipulated special conditions have been met.</p> <p>The date when we expect to commence contact with human participants or access their records is: <u>28.10.02</u></p> <p>We hereby declare that we are aware of the principles and requirements governing research involving human participants, as expressed in the Human Research Ethics Committee's <i>Guidelines</i>, and we agree to the standard and special conditions (if applicable) stated above.</p>	
<p>Signed: <u><i>Patrick Duggan</i></u> (Principal Investigator or Supervisor)</p>	<p>Date: <u>12/12/02</u></p>
<p>Signed: <u><i>Shirley Hardt</i></u> (Student Researcher)</p>	<p>Date: <u>16.12.02</u></p>

## Australian Catholic University Human Research Ethics Committee

### Request for special conditions to be met by the student researcher

Principal supervisor: Professor Patrick Duignan  
Co-supervisor: Associate Professor Deirdre Duncan  
Student Researcher: Mrs Leoni Degenhardt

Ethics approval has been granted for the project:  
*Reinventing a school for the 21<sup>st</sup> century: a case study of change in a Mary Ward school.*

Human Research Ethics Committee Register Number: N2002.03-19

Approval has been granted subject to the standard conditions and to **five special conditions**. Please find below the responses concerning these special conditions:

#### General Information

- Ms Nicole Mockler is an employee of Loreto Normanhurst. Her role as Director of Professional Learning involves supporting staff from all sectors of school life with professional development. She is also responsible for research initiatives. In this capacity she chairs the school's Practitioner Research Advisory Committee, a member of which is the Chair of the Academic Board of the University of Sydney, Professor Judyth Sachs. Ms Mockler conducts and analyses the school's annual surveys of parents, Year 12 students and staff and, on a regular basis as part of the school's ongoing research into learning, conducts focus group interviews with students, parents and staff. Ms Mockler is currently a PhD student with the University of Sydney.

#### Project Particulars

- Request noted. All staff will be invited to participate in focus groups etc.

#### Gathering, security, disposal of data; dissemination of results

- Data will be stored in a locked cabinet in the Supervisor's office.

#### Confidentiality, anonymity, privacy

- The Information Letter has been amended to remove apparently conflicting advice.
- The primary point of call regarding ethical issues has been reinforced as the Chair, ACU HREC with the removal from the Information Letter of any reference to the Verity Committee within the school.

#### Information Letter to Participants

- Res.services footer is not possible to delete digitally. Is this possible to address? It will be removed by printing out the documents, whiting out the footer and photocopying.
- Suggested amendments have been made.
- Suggested amendment has been made.

A copy of the amended Information Letter is attached.

Signed:   
Leoni Degenhardt  
Student Researcher

22 February 2003

**TO BE COMPLETED BY THE CHAIR OF THE EXPEDITED REVIEW PANEL**

I confirm that the special conditions stipulated by the HREC in relation to the commencement of data-collection have been met and that the conditions to be adhered to in the course of the project have been acknowledged by the researcher/s

Signed: ..... *John Gal* CHAIR, HREC ..... Date: ..... 20/3/03 .....

Appendices 19 and 20 are attached to the back cover of the thesis.

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**Appendix 19: Brochure about the Loreto Normanhurst Student Growth Model**