# *Journal of Leadership, Scholarship and Praxis in Education*

A research practice partnership between
University of Glasgow School of Education
and
Glasgow City Council Education Services

## Volume 1
### March 2025

University of Glasgow, School of Education

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# Foreword

**Dr Douglas Hutchison, Executive Director of Education, Glasgow City Council**
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This journal sits comfortably at the intersection between research informed practice and practice informed research. The contributors are clearly interested in how we bring research to our daily practice with children and young people. However, they are also setting out how that daily practice needs to inform further research that is relevant to the classroom or playroom. The articles are brimming with relevance and also show the values led approach of the contributors. Tackling the deeply entwined issues of poverty and inclusion run through the contributions from Lobo, Fisher and Dudgeon on inclusion in primary schools; Kelly on more effective use of support for learning workers; McConachie's focus on the language of inclusion; McDermott's critique of the systemic lack of data and options for early school leavers; and Stewart's focus on collaboration to support inclusion. Tackling the issues of poverty and inclusion are clearly the beating heart of leaders in education.

It is also interesting to note how much we all still live in the shadow of the Covid pandemic with very practical reflections from Baker on wellbeing and pupil voice and Mochan on the ways Covid has shaped and challenged headship. Educational leaders in my experience tend to be very practical people and that is evident in the contributions. In particular Graham's article on BGE to senior phase transitions which continues to be a contested issue, although perhaps not sufficiently contested yet to lead to meaningful change. Likewise, the focus on interdisciplinary learning from Arthur, Corral and Harvie opens once again a very necessary discussion in a post-Hayward landscape, in line with several contributors pointing to an implementation gap between Curriculum for Excellence intention versus practice. Mills usefully focuses on the opportunity gap in the PRD process which demands leadership in order to achieve its potential while Preston takes us back to the key to improvement which is rigorous self-evaluation. Finally, Hamilton sets out the ways in which drama can be used to enhance young people's participation as it is an inherently collaborative subject.

As mentioned, the values led approach of all contributors is commendable and shines through every page. In the context of permanent reform in education it is encouraging to know that colleagues can be rooted in the literature and research as well as making this significant contribution to the body of literature available on key issues facing Scottish education.

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Dr Douglas Hutchison is the *Executive Director of Education* for Glasgow City Council and a member of the LSPE Editorial Team. Throughout his career, he has advocated for educators to be strong role models of lifelong learning. He has always been interested in research and has completed a Masters in Psychological Research Methods at the Open University, a MSc in Educational Psychology at the University of Strathclyde and recently, a Doctorate in Educational Psychology at the University of Strathclyde. He believes educational policy and leadership practice should be rooted in research, and the profession should consciously critique local and national policy decisions to ensure children and young people benefit from practice that has a credible evidence base.

# Acknowledgements from the Editor

**Alison Mitchell, Headteacher (Principal) in Residence, University of Glasgow School of Education**
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I extend my deepest gratitude to all those who have contributed to the success of the first edition of the *Journal of Leadership, Scholarship and Praxis in Education*, a partnership between the University of Glasgow School of Education and Glasgow City Council Education Services. The journal was conceptualised by myself (Headteacher in Residence), Professor Margery McMahon (Professor in Educational Leadership, University of Glasgow School of Education) and Ms Andrea Reid (formerly Senior Education Officer at Glasgow City Council Education Services). We had attended the biennial ISATT conference in Bari, Italy in 2023 and had shared two papers that highlighted our partnership, with contributions from the University – Educational Leadership tutors and MEd Educational Leadership graduates – and from Glasgow City Council school and district leaders. We aspired, through this journal, to share practising education leaders' research more widely to inform the profession and to increase their professional learning as published authors.

The publication is the result of a collective effort, and it would not have been possible without the support of so many individuals. I thank our authors, whose scholarship and reflection will inspire others in the field of leadership and learning across Glasgow City Council and beyond. You are all in full time, challenging roles and I thank you for your engagement, effort and perseverance in sharing your knowledge and expertise through this journal. My thanks and appreciation to the University of Glasgow School of Education's academic mentors. Your guidance, encouragement, and belief have been instrumental in shaping both this publication and the contributors' voices as they develop as authors. I am grateful to our reviewers, whose rigorous feedback and constructive critique have challenged the authors to refine each paper, to support the quality and the integrity of the publication. Thank you to our copyeditor Margaret Barr for a meticulous job, and to Matt Mahon, Research Information Officer at the University of Glasgow and Journal LSPE Administration Manager.

Finally, thank you to the University of Glasgow School of Education and Glasgow City Council Education Services for your support with this endeavour. We look forward to continuing with future issues and hope that the *Journal of Leadership, Scholarship and Praxis in Education* will grow as a platform for meaningful dialogue and professional growth in Glasgow and beyond.

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# Interdisciplinary Learning: A Study of Practice within Secondary Schools in Glasgow, Scotland

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## Abstract

The need for young people to acquire transferrable skills and knowledge by blurring disciplinary boundaries and applying their learning to real life contexts has been a theme of global educational policy in recent years (OECD, 2018a; United Nations, 2015).  Within Scotland this is reflected in *Curriculum for Excellence* where Interdisciplinary Learning (IDL) features heavily and is cited as one of four main contexts for learning alongside: Curriculum areas and subjects, Ethos and life of the school, and Opportunities for personal achievement. However, some studies indicate that an implementation gap exists and that IDL is not being fully realised in practice (Graham, 2019; Harvie, 2018). A recent report suggested that "Colleges and universities might consider partnering with practitioners to measure the impact and requirements of quality IDL experiences." (Education Scotland, 2023, p. 7).  In line with this, Glasgow City Council and the University of Glasgow partnered to conduct a research study in three secondary schools in Glasgow which were identified as having good practice in IDL. This article presents the findings in relation to approaches participating schools used to plan and implement IDL and the impact this work had on pupils and the wider school community.

*Keywords:*  interdisciplinary learning (IDL), secondary schools, collaboration, structured time

## Introduction

Scotland's recent growth of consultations and reports on education and assessment (Scottish Government, 2022, 2023a, 2023b, 2023c), reflect the fact that there is growing international concern that educational systems across the globe need to change.  There is increasing recognition that traditional, disciplinary based structures and approaches are not adequately preparing young people to face the many diverse and complex challenges of today's world and allow them to survive and thrive (Rincón-Gallardo, 2020).  In fact, many scholars have been contending this for years (Mehta et al., 2012; Morin, 1999).  In a report for UNESCO in 1999, for example, Morin wrote,

> Humans are physical, biological, psychological, cultural, social, historical beings. This complex unity of human nature has been so thoroughly disintegrated by education divided into disciplines, that we can no longer learn what human being means. This awareness should be restored so that every person, wherever [they] might be, can become aware of both [their] complex identity and shared identity with all other human beings. (Morin, 1999, p. 2).

Factors which have made arguments for more integrated approaches to education even more compelling include the rate of technological advances, the rise in artificial intelligence, inequalities, threats of violence and war, economic instability and the effects of what has come to be known as the Anthropocene.  The Anthropocene denotes the most recent period in the history of the Earth in which human activity has begun to have a visible impact on the climate, environment and ecology of the planet (Fazio, 2022).  It could be said that in preparing students to face the myriad of uncertainties which exist in the future, the "what" that students require to know has now changed (Virtue et al., 2019). To face these complex challenges, students need to learn to problem solve, think creatively and gain access to different forms of knowledge, both propositional (knowing "that" i.e. learning facts and figures), and procedural (knowing "how" i.e. developing skills of applying knowledge in practice) (Priestley & Nieveen, 2020). This uncertainty and unpredictability of the future is discussed in reports such as the OECD 2018 position paper *Future of Education and Skills 2030* (OECD, 2018b) which highlights the need for opportunities and solutions when society is changing rapidly.  It suggests that when the world feels volatile, uncertain, complex and ambiguous, education can make a difference and help people to embrace the challenges they are confronted with, and that curriculum and more radical curriculum approaches should continue to evolve.

This article reflects on the context of interdisciplinarity with the Scottish curriculum and considers the nature of IDL using a theoretical framework.  It then goes on to present the methods and findings of a qualitative study conducted by Glasgow City Council and the University of Glasgow which considered how three secondary schools in Glasgow planned and implemented IDL projects within their respective establishments, and the impact this had on their students, teachers and the wider school community.

### Interdisciplinary Learning

*Curriculum for Excellence* (Scottish Executive, 2004) features "interdisciplinary learning" (IDL) prominently as one of the four contexts for learning alongside, "Curriculum areas and subjects'" "Ethos and life of the school" and "Opportunities for personal achievement".  Within Scottish policy documents there are key themes which can be identified in relation to the practice of IDL.  These include: making links between subjects, ensuring contexts for learning are made relevant to pupils, developing knowledge and skills, making room for innovation, creativity, and partnership working. However, it is widely recognised that in relation to interdisciplinary matters there is a lack of conceptual clarity in the policy arena (Graham, 2019; Harvie, 2018; Shelley, 2019). Factors such as providing relevant contexts and developing knowledge and skills, for example, can pertain as much to teaching and learning within discrete disciplines as they do to IDL, so these themes can often make it difficult to determine what is unique about interdisciplinary tasks. Important questions remain unanswered for practitioners such as those raised by Humes (2013) e.g. What should the starting point for teachers be when planning an interdisciplinary lesson?

*The Refreshed Narrative on Scotland's Curriculum* (Education Scotland, 2019) has maintained a focus on IDL, and the more recent *It's Our Future - Independent Review of Qualifications and Assessment: Report* (Scottish Government, 2023a) has associated IDL with Project Based Learning (Häkkinen et al., 2017), recommending that all students should have access to this type of experience and calling for a broader range of qualifications to recognise wider achievements of young people.  However, in May

2024 a report entitled *Evaluation of Curriculum Design in Scotland* (Education Scotland, 2024) stated that "Interdisciplinary learning (IDL) remains an underutilised element of curriculum design across all sectors. There remains lack of clarity regarding high-quality IDL and how it is distinct from other approaches to organising learning." (2024, p. 15). This sentiment was echoed in response to the *It's Our Future* report by the Scottish Government in September 2024 when it concluded that "We are therefore of the view that more work is required if high quality interdisciplinary learning is to essentially become a mandatory part of the Senior Phase curriculum in all secondary schools." (Scottish Government, 2024, p. 9).

Following the recommendations of *It's Our Future*, Education Scotland (2023a) updated their thought paper entitled *Interdisciplinary Learning: Ambitious Learning for an Increasingly Complex World* to provide further guidance for practitioners. This document provides a detailed account of the work done by a national co-design group and their thinking around IDL, particularly how it might be realised in the senior secondary phase. One of the issues raised in this document is that "There is still scepticism about the quality of learning achieved in secondary through IDL experiences." The suggestion is then made that "Colleges and universities might consider partnering with practitioners to measure the impact and requirements of quality IDL experiences." (Education Scotland, 2023, p. 7).

This article outlines a piece of work in line with the suggestion made above where academics and practitioners worked together to consider the practicalities and impact of IDL work in three secondary schools in Glasgow. The study was conducted by staff of Glasgow City Council and the University of Glasgow and explored ways that IDL can be implemented successfully in the secondary sector. A small-scale research study was conducted in the three schools, and focus group discussions were held with members of each school's senior leadership team, class teachers and pupils to investigate their IDL practice and experiences. Participating schools had been identified by the local authority as having undertaken successful IDL pilot projects in the past. The aim of the research was for academics and practitioners to work collaboratively to gain an insight into the ways these secondary schools had planned, implemented, evaluated and assessed the impact of IDL. The theoretical framework outlined below was used to shape the focus group questions and design the study.

**Framework for IDL**

Repko (2008) draws on a number of definitions of interdisciplinary studies to define IDL in the following way:

> Interdisciplinary studies is a process of answering a question, solving a problem or addressing a topic that is too broad or complex to be dealt with adequately by a single discipline, and draws on disciplinary perspectives and integrates their insights to produce a more comprehensive understanding or cognitive advancement. (Repko, 2008, p. 12).

This definition of interdisciplinary education contains a theme which appears consistently within the academic literature, namely that of students being involved in solving problems or finding solutions to questions which are pertinent to them. Indeed, philosophers such as Augustine (2009) have long seen problems as a source of knowledge creation. Brand and Triplett (2012) highlight problem solving as an important aspect in impelling students to find their own answers, draw their own conclusions, and create their own solutions. Virtue et al. (2019) argue that interdisciplinary lessons can be more efficacious when they are problem based but qualifies this by saying they must also be clearly and deliberately aligned to course material. The interdisciplinary approach then is one which propels students to draw on their existing disciplinary knowledge and skills (from two or more

disciplines), in order to complete a sufficiently challenging activity or problem which they have been set or have set for themselves. So IDL goes further than enabling students to make cross-curricular links, but fosters synthesis, resulting in cognitive advancement in the respective disciplines (Repko, 2008). The starting point must be a relevant problem or issue that students are motivated to address which requires them to draw on their disciplinary insights (from two or more disciplines) and apply their knowledge and skills, resulting in deeper learning.

The Project Based Learning (PBL) approach is an effective way to develop 21st-century capabilities by promoting critical thinking as well as problem-solving, interpersonal communication, information and media literacy, cooperation, leadership and teamwork, innovation, and creativity (Häkkinen et al., 2017).

**Figure 1**
*IDL Framework (Harvie, 2020)*
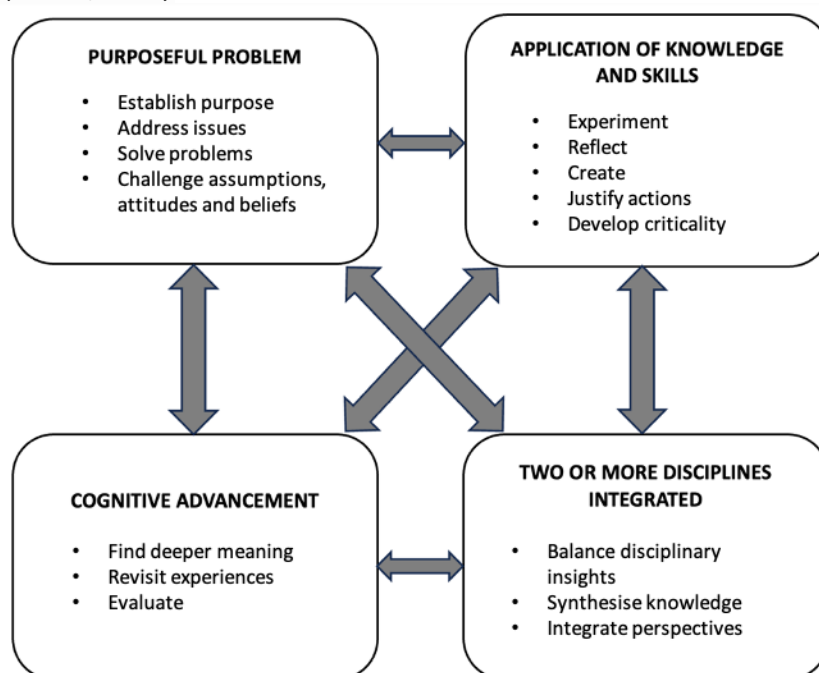


Figure 1 illustrates the purposeful problem as being a major component of IDL, i.e. a question or issue which is meaningful to the learner. Students then apply and integrate knowledge and skills from two or more disciplines to solve or answer it. During the activity pupils engage in exchanging thoughts and ideas and this involves developing criticality, reflecting, justifying their actions, integrating perspectives, revisiting their experiences and evaluating their findings throughout the process as illustrated by the diagram. The arrows indicate that this is not a linear process.

## Methodology

This research was conducted as a qualitative study of three secondary schools which had recently carried out successful IDL projects.

### Epistemology

A pragmatic constructivist approach (Elgin & Goodman, 1988) was adopted for this research which views the purpose of inquiry as being the advancement of understanding rather than the search for absolute truths. Educational research must be adaptable to individual school contexts and therefore

the pragmatic constructivist paradigm was appropriate in this case as the researchers were concerned with understanding how different schools planned and implemented interdisciplinary approaches in their own unique contexts (Weaver & Frey, 2018).

**Focus Groups**

Ethical approval for this study was granted by Glasgow City Council. The three participant schools (Table 1) were identified as being of good practice in IDL by the local authority and the headteachers were approached and asked if they would like to volunteer to take part in the study. In each school, three sets of focus group discussions took place and the questions were shaped by the IDL framework (Figure 1) in relation to ascertaining how a purposeful problem was created, how knowledge and skills of pupils were applied in the process, which disciplines were involved and what cognitive advancements were made. One focus group was with the senior leadership team, another was with teachers involved in IDL projects and then the final focus group comprised pupils who had been involved in this work. In total, nine focus group discussions were conducted. These were attended and facilitated by the three researchers who asked the guiding questions, took notes and made audio recordings of the conversations. Each focus group comprised between six and ten people.

Focus groups can be considered as an effective method of collecting qualitative data and involve group discussions which are facilitated and guided to gather insights, opinions, attitudes and emotions of participants on a specific topic. Many professional fields utilise focus groups as opposed to other data collection techniques as they can elicit detailed data in a timely and cost-effective fashion (Morgan, 1996). In discussions, participants can answer questions in an unrestricted manner, using their own words, and facilitators are able to probe certain comments or ideas for further information if they feel this would be useful (Stewart & Shamdasani, 2015). The group dynamic is also conducive to ideas being built on spontaneously and the fostering of natural debate (Nyumba et al., 2018). Although individual interviews may have gleaned more in-depth information from participants, focus groups were considered a more expedient and effective method in this case due to the time pressure of busy professionals working in school and the constraints of the secondary timetable.

**Table 1**
*Study Participants*

| School | School Roll | % of young people living in the 20% most deprived data zones in Scotland: SIMD Zones 1 and 2, according to the Scottish Index of Multiple Deprivation.[1] | % of young people registered for Free School Meals (FME) |
|--------|-------------|-------------|-------------|
| A | 1051 | 76.8% | 44.6% |
| B | 1201 | 34.1% | 24.3% |
| C | 493 | 93.5% | 62.3 % |

N.B. All data is correct as of census information in 2023.

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[1] The Scottish Index of Multiple Deprivation (SIMD) (Scottish Government, 2020) is a tool to identify areas of concentrated deprivation.

**Findings**

**Purposeful Problem**

In all of the participating schools, a group of core staff, supported by the senior leadership team (SLT), worked together to plan the IDL projects.  The teachers involved spoke strongly about the fact that their starting point was to create purposeful problems by finding relevant, real-life issues and topics that pupils would be interested in and even passionate about.  In one school, young people were consulted at the outset about things which mattered most to them.  Each school went through a brainstorming phase where ideas were gathered from teachers from different departments, and this meant they were able to provide disciplinary perspectives from their particular area of expertise.  It also allowed them to share what pre-existing knowledge and skills pupils already had in the various subjects as well as giving consideration to the practical implications of the topics under discussion.

> We had just taught climate change in science at that point so I knew the children would have the background, the foundational knowledge…to take their studies a wee bit further, more depth.

Teachers spoke about the need for creativity at this stage and adopting a solution focused approach:

> We sat around a table with big sheets of paper and mind mapped, a bit of blue sky thinking, and tried to be creative.

In each school there was a range of IDL projects which ran concurrently and these focused on solving big problems and answering questions related to sustainability such as: "How can we survive the Anthropocene era?"; "Is vegan food better for the climate?"; "How can we create sustainable fashion?"; and "What can we do to address homelessness?".  Each IDL group resulted in students producing very different outcomes and these included: creating vegan menus; cooking food; designing sustainable clothes; upcycling clothing; performing dance and live drama; and designing a homeless shelter.

All schools selected specific year groups to be involved in the IDL work (mainly S1 and S2 due to timetabling restrictions for the older pupils). Providing an element of personalisation and choice for young people was highlighted as being important.  Two schools allowed the students to choose which IDL group they wanted to be part of and in the other school the SLT reflected that, next time, they would give pupils more say in the initial topic and problem selection.

**Application of Knowledge and Skills**

Teachers and pupils from all schools indicated that through participating in IDL, pupils were able to demonstrate and develop a range of skills. They indicated that they were very engaged in the project, showing enthusiasm and commitment towards the topic. Teachers highlighted that this led to increased engagement and as a result, greater attendance for some pupils. Teachers and pupils also reported several specific skills that were demonstrated including creativity, improved social and communication skills, teamwork, increased confidence and presentation skills. Greater opportunities for taking on leadership roles and developing leadership skills was also highlighted across all schools by teachers and pupils, with pupils specifically noting that they applied their learning to discussions outside of school with family and friends and felt they could apply this more to real life situations.

> We had moments of like magic that were coming in through the cycle. The buzz, the motivation but also the collaboration that was going on.

In terms of relationship development, the SLT, teachers and pupils across all schools reported that the pupils formed good relationships, and even new relationships, with their peers in the groups during the project. They highlighted that the pupils were supporting each other's learning and encouraging others to take on roles where they felt less confident to help them be included in the learning. Teachers and pupils both reported they were also able to develop stronger, and in some cases new, teacher-pupil relationships, commenting that the learning environment allowed them to build deeper connections and interact with a wider range of pupils/teachers.

> One of the unintended nice parts of the project was I was able to speak with pupils more, I don't normally get to do that…I got to see them at their best…

> What was nice for us was the way they were helping each other. Once one had learned it, even if they were in a separate group, they were helping each other.

The SLT, teachers and pupils across all schools reported that IDL created a different learning environment that gave teachers flexibility in approach and pupils more control over their learning. They noted that the environment supported the regulation of behaviour, engagement and participation of most pupils. In particular, the SLT and teachers in two schools indicated that it allowed them to challenge the pupils at certain points, bringing in more advanced concepts of learning. In addition, teachers indicated that IDL gave them further flexibility to use skills and knowledge that they do not require or apply in the teaching of their subject. Pupils across all schools indicated that they felt IDL allowed them to have greater independence and ownership of the process which resulted in more control of and pace of learning. They highlighted that they felt a sense of task completion through IDL, and a sense of pride in the outcome.

> It kind of builds your leadership skills and your confidence in yourself because when you're in classes, you've been told to do this and been taught how to do it. It's not helping you feel independent in your own learning, but when we do IDL, it's like you're taking that extra step and being responsible for your own learning.

> We set the bar quite high in terms of quality of work…we threw in National 5 work and they run with it and love it…you were doing things that you maybe wouldn't do with a first year.

The SLT and teachers across all schools indicated that staff knowledge increased and that over time, there was an increase in staff confidence to be flexible and work differently. Teachers across two schools indicated that involvement in IDL increased their knowledge of the topic area which impacted positively on their enthusiasm. They also indicated that the project helped them develop specific skills including a better understanding of curriculum design, leading staff groups and timetabling. In addition, they felt greater flexibility in how they taught concepts that changed their approach within their wider teaching in their subject.

> I had a better understanding of curriculum design and just getting into it a wee bit more rather than just, we are covering this because this is what is in the curriculum…having some choice and being able to link things in a more natural way.

**Two or More Disciplines Integrated**

In all schools, time for planning projects was prioritised. SLT ensured protected and allocated time for teachers to collaborate. This was key for teachers to meet from different areas in the school and greatly improved the ability to communicate. In two schools, planning took more time than expected, "So what went well was the collaboration between teachers and they really enjoyed it, working together."

In all schools, teachers noted that through IDL they developed a greater understanding and knowledge of other subject areas that allowed them to integrate the disciplines better and identify overlaps.  They developed knowledge of the subject and taught skills or concepts that they don't normally teach. In addition, teachers felt they had more flexibility to approach other staff from other subject areas, to get support in skills or learning from their subject area and enjoyed learning concepts from other subject areas and teaching them.

> We were talking about science and I didn't have a clue about that, but then a colleague was explaining stuff so I got a bit of cross department understanding…you learned about other subject areas.

> I think definitely, what I enjoyed most was teaching stuff that I don't normally get to teach, stuff that I've got an interest in …that I'm passionate about but I don't normally get to do that.

Teachers in one school indicated that through the project, pupils were able to show a good level of understanding of the integration of the subject areas and apply skills from multiple disciplines at once.

> I think they (pupils) had a real ability to connect across our subjects well ... just that sort of connection across three or four subjects.

Pupils in one school highlighted that they enjoyed their subjects being integrated and they were able to synthesise knowledge across them. They indicated a pride in their end product and IDL helped them to understand how subjects could integrate to produce that end product.

> I liked that all your subjects, were in like, cohesion, almost so you didn't have different things to worry about and it made sense. All the subjects were working together.

> The final combination of all the events coming together and seeing that, all the work we've done…you didn't think they (the subjects) really related to each other because we had Drama, Food Tech, English and Dance…but it all came together.

**Cognitive Advancement**

In all schools, teachers and pupils were able to deepen their understanding of certain learning concepts as it applied to a real-life context and became more relevant to them.

> It gives them an opportunity to interpret it in real life…we looked at graphs, normally that's a bit abstract if we are looking in class whereas if they're investigating something and have to interpret it….it gave more chance to do that (increase their understanding).

In two schools, meta-skills were a focus for pre and post self-evaluation. Tools included a coaching wheel and in one school, a meta-skills passport. A range of assessment was employed across all schools including feedback, an end product and group/final presentations which were evaluated by peers and teachers.

In one school, SLT and teachers indicated that for future projects, consideration will be given in relation to linking the learning and skills development to the wider curricular Experiences and Outcomes.  Teachers adopted professional judgement through observation, and projects provided a lot of evidence produced by pupils that was used for assessment.

In one school, pupils felt that they were able to take ownership of their learning which led to a great deal of enthusiasm and engagement in the topics, as well as a sense of pride in their work. IDL as an

approach was more enjoyable and allowed pupils to learn in a different way and then apply their learning in a more relevant context.

> I think kind of empowered …it wasn't exactly like we were just doing something and it was the teachers delivering the message, it was our work and through like our words, this message was getting sent round people and it makes me feel proud.

**Unintended Outcomes**

SLT commented that they were surprised at how teachers from different departments worked so collaboratively to plan and implement the IDL work.  They also noted that many of the teachers developed their leadership capacity through the project, even though they held no official leadership position.

> The leadership of staff was very impressive…there was definitely strong teacher leadership and some of the people who emerged as leaders had no formal leadership roles within the school.

Teachers also reported that they had enjoyed the experience of working with colleagues they didn't normally get the chance to work with and that this had given them a better understanding of the work going on in other subject areas and helped develop their own skills, as noted in the comments below.

> I enjoyed working with people I wouldn't normally work with…to see the natural overlaps (between subjects) and also the differences and to have appreciation for what that involved.

> Towards the end of the week everyone was teaching maths…I had to learn how to do that… talking through maths concepts I hadn't done in years.

Another unintended outcome of the IDL projects, as noted above, was that relationships between teachers and pupils were enhanced.  Teachers felt the learning environment created through this work allowed them to build stronger relationships and connections with students because there was more time for communication and they were able to interact with a wider range of young people, some they normally did not get to teach.  The levels of confidence and creativity in the pupils also surprised teachers.  In one school, staff reflected on a student who often presented with challenging behaviour coming into their own during IDL activities and thriving in the process.  "We were seeing a different side to young people who can normally struggle."

In addition, teachers highlighted that pupils had developed their social skills and capacity to collaborate and communicate with others through the problem-solving process.  They had also developed transferrable skills that could be used within the wider school through their IDL work. "Those kids were able to transfer those skills into getting their Duke of Edinburgh qualification which was good." Pupils themselves also reported that they enjoyed the freedom of working in this way and felt that they had developed not only their knowledge and understanding of the issues they were investigating but also their confidence and social skills.

### Conclusion

To conclude, this study outlines some of the factors which promote IDL in schools and the impact of implementing IDL on teachers and pupils in the schools in the study.  Collaboration between teachers is seen as a strength of adopting an IDL approach, which supports the integration of multiple disciplines.  Structured time for teachers to plan IDL together is required. IDL helps teachers develop a greater understanding of other subject areas and allows them to integrate disciplines, learn and

teach new concepts, and bring in more advanced concepts of learning to challenge pupils as appropriate.

In this study, IDL helped pupils make connections between disciplines and apply their learning to real life relevant contexts, which in turn led to increased pupil enjoyment, engagement and a sense of empowerment and agency. This correlates with previous studies which have noted the importance and necessity for student understanding of how the learning and skills developed within the classroom can be applied to the wider context (Ladson Billings, 1995; Paris & Alim, 2017).   Through IDL, the pupils demonstrated a stronger sense of ownership and control over their learning, leading to more opportunities for innovation and creativity within the projects. This aligns with the research on an ecological approach to teacher agency by Priestley et al. (2015) which recognises that people are more motivated and enjoy their work more when they feel ownership and are able to achieve agency in their work.  IDL also facilitated the strengthening of current relationships, and development of new ones, leading to greater partnership working, peer support, and pupils and teachers taking on greater leadership roles.

**Limitations**

While the data obtained in this study included both the pupil perspective and teacher experience of implementing IDL, this was a sample gathered from three establishments in one local authority and from within the secondary sector alone. Therefore, it cannot be stated with certainty whether outcomes described here would be replicated in other establishments adopting an IDL approach. However, generalisation was not the aim of this study but rather a deep understanding of the contexts and practice of the participant schools.  It is up to readers to draw their own conclusions and generalisations based on the evidence and the relevance to their own particular circumstances.

**Recommendations**

Structured time for teachers and pupils to plan IDL was identified to support the understanding of the process and could impact how the process is implemented. During the implementation of the IDL project, protecting time within the timetable may be required to allow for communication and ongoing review and planning of the process. Consultation between teachers and pupils at the outset to agree projects which are of concern for young people and take account of real-life issues may help to ensure relevance to the participants and improve engagement. Setting clear learning outcomes are also recommended to support understanding of the process. Assessment of an end product or a final presentation was highlighted by pupils and staff as an important aspect of IDL to provide a feeling of achievement and is recommended to evaluate project outcomes. However, greater structure in relation to assessment and evaluation is recommended through exploring the use of curricular experiences, outcomes and benchmarks. Clear learning outcomes are necessary.

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# Wellbeing and Learning Post-Pandemic: Amplifying the Voices of Early Secondary School Students

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## Abstract

Education systems have had to rethink their approach in terms of wellbeing and learning particularly in response to the COVID-19 pandemic and the numerous crises being faced across the world. Learner voice has to be woven through all levels of policy in order to understand the experience of young people, during and since the pandemic. Post-Covid, there is a need for educational reform to articulate the direct link between wellbeing and learner progress and to debate the questions of how we assess learner progress. This journal article draws on a small empirical study of learners, conducted by a headteacher researcher in June 2023, to explore participants' experiences of learning in their first two years directly following school closures. The paper draws on literature from the original study, completed in 2023 and literature published since. It aims to highlight the voice of the learners as being crucial to research on wellbeing and learning and to amplify the influence of learner voice on further research and policy making.

The research findings demonstrate that, immediately following the pandemic, young people had a heightened awareness of their own wellbeing and the support that they require.   This paper challenges educators to consider how the change in young people's engagement with this aspect of their learning might be used to influence educational reform. The study also highlights the importance of privileging the learner experience with practices that encourage safe articulation of complex feelings.

In terms of learning, the findings suggest that there needs to be a deeper consideration of how and what young people learn, what motivates them to learn and how attitudes both to how and what they learn has changed since the pandemic. While the general discourse of curriculum reform in Scotland is asserted to be in line with the views of the young people, there is a dearth of evidence of young people's voice influencing policy change at all levels.

*Keywords:*  wellbeing and learning, learner voice, learner experience, COVID-19 pandemic, post-pandemic

## Introduction: Context and Problem

As a new headteacher in 2021, it was clear that the immediate effects of the COVID-19 pandemic were having a significant impact on the young people and how they were interacting with school. Following the pandemic, the changed societal value placed on wellbeing is evident in the attitudes and actions of young people in school. Society is placing much greater value on mental wellbeing,

prioritising wellbeing over the demands of school structures and expectations. Parents and carers focus more on wellbeing and do not view absence from school as a barrier to learning but rather a way to stay well. This is evident in the decreased attendance rates in school, which are still struggling to return to pre-Covid levels (Klein & Sosu, 2024). Issues such as pressure to catch up, anxiety and fear, which were a clear part of the picture in post-pandemic research (McDonald et al., 2022), continue to be a real concern for families and young people.  Such remaining fears about young people's ability to cope in school are reflected in the way that young people are engaging in their learning.

The policy context has also changed in light of the pandemic and highlights the links between wellbeing and learning through research. Fullan (2021) made clear the inter-connectivity of wellbeing and learning and the impact that this has on success. Kiptiony (2024) places even more emphasis on the importance of wellbeing as a focus for success. Schools are responding to the collective trauma experienced by young people during the pandemic and continue to help communities to heal – not just from the symptoms of the pandemic but from the continuing trauma caused by poverty, racism and classism (Parameswaran et al., 2024).

The embedding of the United Nations Convention on the Rights of the Child into Scots Law in July 2024, ensures that the views of the child are central to empowering young people in areas which concern their lives. What we might ask is whether the educational policy context is responding to the changing values and views of the young people. Research often has an adult interpretation of the learners' experiences which have become more complex as a result of the pandemic. As we progress with our learning from the pandemic, social and emotional education is becoming prioritised, a key part of this is the emphasis on the learner voice in the design of curriculum around wellbeing and learning (Cefai, 2024).

From analysing the articles utilised in the literature review, only two included empirical research with children or young people, three included voices of experiences of those in young people's lives (such as teachers or family members) and the majority were translated by the voices of school leaders or interpreted through quantitative data studies. In Scotland, educational policy emphasises the importance of learner voice in the design of curriculum and educational reform (Scottish Government, 2023a), however, in much of the existing research it is notably absent.

The tension between global, national and local policy in terms of the emphasis on the voice of the learner and the reality of those voices being absent in the research led to this study. The aim was to explore and amplify the voices of a groups of learners who had been significantly impacted by the pandemic as a result of transition process between primary and secondary education being affected by the school closures. This would help determine whether the views of the learners chimed with the direction being taken by policy reform and highlight the importance of the learner voice in the decisions being made about their educational experience.

## Literature Review

As the focus of this paper is on a post-pandemic landscape, only texts which were written in the four years between 2020-2024 are explored. The empirical study asked learners about their views on the changes in their wellbeing and learning since the pandemic – this study was undertaken in 2023. As the participants were asked to look at wellbeing and learning separately, the literature review also looks at them separately.

Exploration of studies which have been developed by organisations with a focus on the learner experience often focus on "school voices" (UNICEF, 2022) rather than "learner voices" and these voices come from school leaders. The "voices" of learners in this case should not be tokenistic

(Pleasance, 2016).  National reports such as *School Recovery Strategies: Year 2 Findings* (Department for Education, 2023) also rely on the voices of school leaders and parents.  What needs to be redefined is the ability of all children to be able to communicate, we should never assume that the child's voice needs to be expressed through that of an adult or that children should be treated as one homogenous group (Williams, 2023).

Most recently, *All Learners in Scotland Matter: The National Discussion on Education* (Scottish Government, 2023) highlights the inclusion of the voice of a diverse range of learners and places a focus on learning and wellbeing incorporating direct quotation from young people. While the report responds to the voice of the learner and took place post-pandemic, there is a notable silence in terms of any reference to the changes that have taken place in learning and wellbeing as a result of the Covid-19 pandemic.  It is important that the change in the learner experience since the pandemic and their reflection on the change in learning and wellbeing is included in the reform which is being undertaken as a result of our learning since the pandemic. Currently, there is a disconnect between the discourse and the action.

Eirdosh and Hanisch (2021) outline a compelling project which aims to "empower our students to elevate their voice as drivers in the cultural evolution of their school" (p. 470). The project incorporates as the key elements of focus, learner voice being used to develop understanding of wellbeing (through their topic of human behaviour) and driving learning forward. This project chimes with more current views like that of Kiptiony (2024) and Cefai (2024) which places the context of the learner voice as being central to the impact on the learner empowerment specifically in terms of empiricism.

> Social emotional education by its very nature is built on students' social and emotional experiences and it thus needs to incorporate and validate such experiences for it to be meaningful for them (Cefai, 2024)

What has become more evident in the literature post-pandemic, is greater recognition of the links between wellbeing and learning.

**Wellbeing Literature**

When exploring the literature on wellbeing post-pandemic, there was an increase in the number of studies which engaged with participants and gathered primary data on the experiences of young people. These texts were mostly transnational and offered insights into the experience of learners and their perception of their wellbeing on returning to school.

Mansfield et al. (2021) present a detailed empirical study on wellbeing in secondary age pupils. However, there are notable gaps here – the voices of pupils were gathered via surveys, much of which then became quantitative data. This reliance on surveys alone – while it can provide qualitative data – does not allow for the probe questions and support which is required in discussions around wellbeing (McGurk & O'Neill, 2016) an area which young people may find challenging to articulate (Skelton, 2008). Other empirical studies (Kim et al*., 2021) outline the concerns of teachers on the wellbeing of learners. This is a similar study in structure and approach but focusing not on the voices of learners but rather that of the teachers. It is worth noting that many of the papers which have been written about pupil wellbeing were written *during* the pandemic. Gervais et al. (2022) undertook an empirical study of Canadian children and adolescents focusing on mental wellbeing and the harm that had been caused by the pandemic. Interestingly, while this study took place throughout the pandemic, many of the findings are in line with the views of young people interviewed. Gervais et al. (2022) also emphasise the importance of the learner voice and how they perceive the experience of the pandemic as being crucial to us understanding

wellbeing. This study proved to be of particular interest as there was qualitative data concerning "Anticipating and Appreciating the Return to School" (Gervais et al., 2022, p. 12) which provided an interesting comparison between the experience during the pandemic and the experience of returning to school.

Grey literature, reports and research carried out by non-academic organisations, also provide an insight into the changes in wellbeing before and after the pandemic. The Scottish Government report *Secondary School-Aged Pupils in Scotland: Mental Wellbeing, Relationships and Social Media* (2021), shows the findings by Ipsos MORI's Young People in Scotland Survey and offers a detailed picture of the mental wellbeing of pupils post-pandemic. However, this was once again done through surveys, the limits of which are stated in the report:

> Limitations include not knowing how accurately the pupils' responses reflect their actual experiences, and pupils who volunteer to complete the surveys potentially differing from those who choose not to complete it' (Scottish Government, 2021, p. 11).

These limits should not be underestimated in a world where wellbeing is at the fore of social and educational concerns (Hargreaves & Shirley, 2022). What is missing in the literature is qualitative data, gathered directly from young people post-pandemic and obvious communication that such data should be used to shape policy. Even before the pandemic, there was a need to gather wellbeing data as measuring wellbeing has always presented challenges (Kempf, 2018). During the pandemic there are studies which aim to address this, often in detail and through quantitative study, but the voice of the learner is silent in the two years since returning to school, particularly in terms of wellbeing.

**Learning Literature**

Learning post-pandemic has been at the centre of reform in Scotland. What we learned about ourselves and about our system had a significant impact on policy makers and on the teaching profession. In the *All Learners in Scotland Matter* report (Scottish Government, 2023a) it is clear that learners want to see a broader range of topics and many of these related to practical and social skills. Much of this is in line with the notion that since the pandemic, learners have felt more aware that learning needs to prepare them to actively participate in society: "More lessons in things that will affect us in the real world so that we will be ready" (Scottish Government, 2023a, p. 27). This could be in response to the disruption of a society that they previously understood. The educational reform report *It's Our Future* (Scottish Government, 2023c) outlines a Scottish Diploma which will respond to views of learners around how they will be assessed and what will be included in the assessment.

The literature proffered by the search terms links closely with this view that learning post-pandemic needs to have a greater focus on social learning: "We need to look beyond learning as an intellectual exercise, to learning that builds the emotional and social intelligence of our children." Kiptiony (2024, p. 3) We also require learning that will serve the needs of society, beyond quantitative data from high-staked assessments that perpetuate a neoliberal system. Ladson-Billings (2021) highlights the importance of "culturally relevant pedagogy" (Ladson-Billings, 2021, p. 71) including the awareness of social issues, how they are influenced by policy, and how they might influence policy and pedagogy which reflects their own lives and experience. This view is echoed in the work of Curran et al. (2022) when considering the re-imagining of Community Youth Work. Hammerstein et al. (2021) undertake a systematic review of the impact of the pandemic on achievement but the study uses test scores as part of the criteria to determine the effect. It is this aspect of measuring achievement which we need to rethink and which can only be done successfully by talking to learners about their learning. The United Nations Convention on the Rights of the Child (UNCRC)

now being in Scots law, identifies a key aspect of the importance of this in terms of a right to an education which develops a personality as well as talents and abilities. To be able to express their views is central to this idea and is very much a core part of education.

## Methodology

The study sought to answer the overarching question:

In a post pandemic Scotland, to what extent are the views of the learner, with regards to wellbeing and learning, reflected in the policy development and enactment?

Three sub-questions were also explored:

1. To what extent are learner's voices represented in post-pandemic research literature and policy?
2. What are the young people's perceptions of the impact on their wellbeing and learning in the first two years post pandemic?
3. How can the amplification of young people's voices better inform educational policy?

An empirical study was chosen as a result of the gaps in research which included a direct voice of young people.  The *headteacher as researcher* role meant that careful consideration had to be given to the ethical approval process as well as the impact of the relationship between the researcher and the participants. Hence the Reflexive Thematic Analysis (RTA) approach (Braun & Clark, 2022) that explicitly acknowledges the positionality of the researcher.

The method of reflexive thematic analysis was used as it aims to *give voice* to participants and tell their stories in a straightforward way (Braun & Clarke, 2022, p. 56). It does not aim to test a hypothesis but rather to engage with the perspectives of the data and to interpret these perspectives. This led to the generation of themes which led to ideas with a view that they could be used to influence policy.

The objective of the study was to work with learners who had been significantly impacted by the pandemic and the school closures. The selection of early years secondary pupils, aged between 12 and 14 was due to the missed transition point of upper primary school and the impact that this may have had on wellbeing and learning. Observations of young people entering first year of secondary saw a significant change in their wellbeing, higher levels of anxiety around school, reduced attendance in S1 and an increase in non-attendance were evident. In terms of learning, the first year of secondary cohort showed reduced literacy and numeracy levels as well as challenges in learning in the classroom environment as part of a group.

The process of data collection was as follows:

- Surveys: 20 participants selected, 13 agreed to undertaking two surveys on wellbeing and learning, survey responses used to develop interview protocol
- Interviews: five participants interviewed on wellbeing and learning, 30-minute interviews.
- Analysis:  six steps of reflexive thematic analysis, themes generated from interview transcriptions, themes analysed.

Twenty learners were selected for questionnaires and 13 took part. Of the 13, five were taken forward to semi-structured interviews (Britten, 2006). The method of collecting and analysing the data collection, which was only completed by one coder due to the small sample size, was synthesized from the work of Braun & Clarke (2006) and is shown in Figure 1.

**Figure 1**

*Six Step Data Collection and Analysis (synthesised from Braun & Clarke, 2006)*
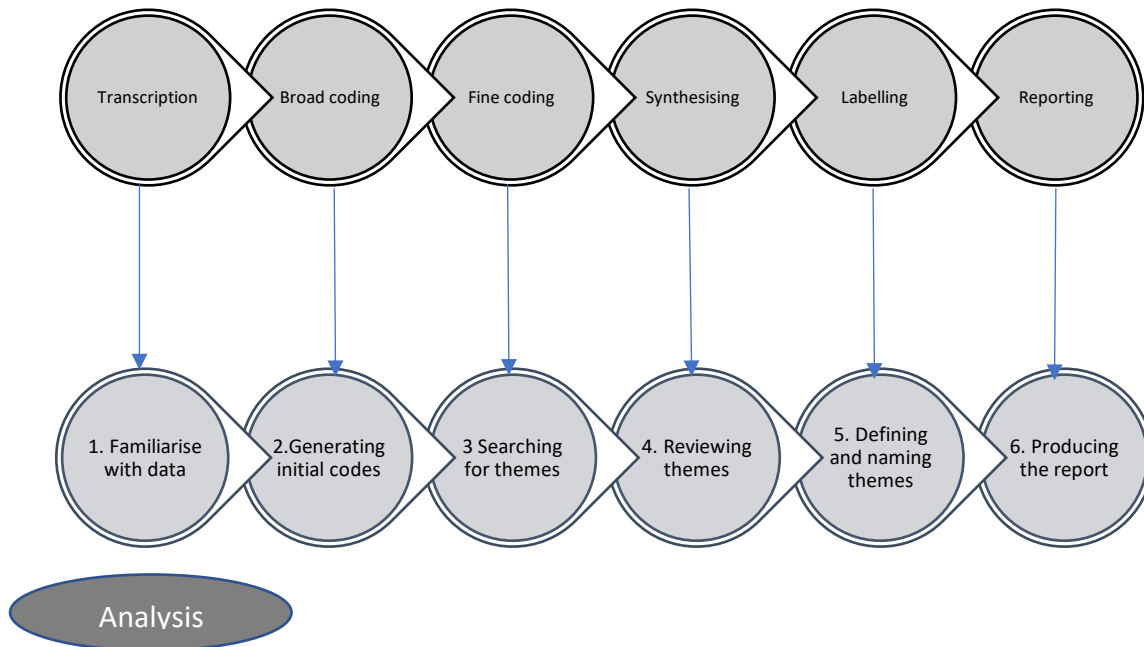


Data items and codes were created to organise the findings. A worked example is given in Figure 2:

**Figure 2**

*Worked Example of Data Collection and Coding Approaches*
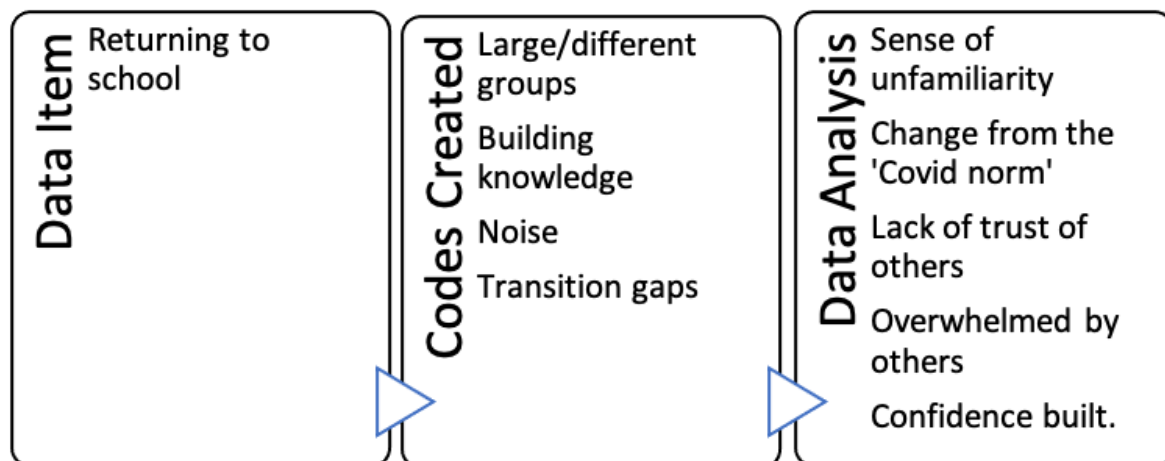


Themes were drawn from the qualitative data which contributed to the defining the headlines for the findings and how these would be useful or relevant to policymaking around wellbeing and learning in the post-pandemic reform of education.

**Findings and Discussion**

At a time when wellbeing is being recognised in society as vital to the individual's ability to undertake an active role in working or learning, the findings from the participants were very relevant. The themes which came through both in terms of wellbeing and learning illuminated aspects which learners felt strongly about. Wellbeing was certainly the area on which participants were able to speak about with the most confidence.

It was interesting to witness the change in young people's capacity to talk about their wellbeing which could be related to their experience of the pandemic and the environmental conditions of the wellbeing of everyone being highlighted on the media and on their return to school. It could also be related to the changes in policy and the participants' consciousness of this focus through consultations such as the *National Discussion* (Scottish Government, 2023a), the *Health and Wellbeing Survey 2020/2021* (Scottish Government, 2023b) and *Getting it Right for Every Child* (Scottish Government, 2022).

The findings were divided into two sections, wellbeing and learning. Each section contained 3 themes, shown in Figure 3 and Figure 4.

**Wellbeing**

**Figure 3**
*Wellbeing Themes and Findings from Data Collection*
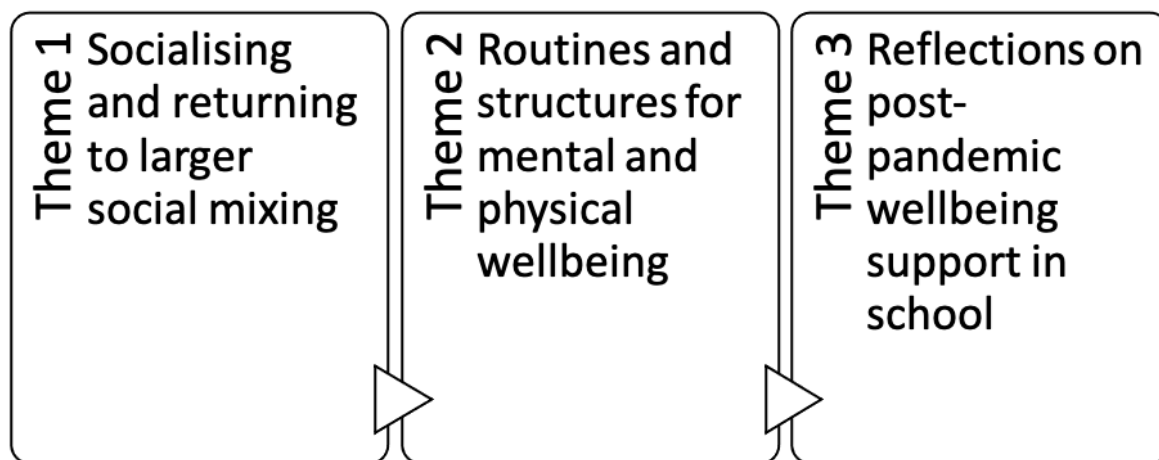


Some of the young people were able to identify that they felt overwhelmed at returning to school. They were unused to large groups of people and that they struggled with noise and with the requirement to be social in groups. However, there were those who indicated that they could see an improvement in their wellbeing as a result of returning to groups. Where young people felt comfortable coming back into larger groups there was a sense of excitement and a feeling that this socialisation was very important to them.

Theme 2 highlighted that young people recognised that routine and structure were an important part of their lives, perhaps in a way that they had not previously realised. The extreme *unknown* nature of lockdown and the lack of any real direction in how to navigate life was stressful and highlighted to young people that routines and structures were important in order for them to feel

calm. This finding suggested that there was a maturity of thinking in the young people interviewed which may not have been there had Covid not impacted their lives.

In contrast to this, other young people found the return to the routines a challenge; since the pandemic this would seem to have been the more common supposition about teenagers returning to the demands and structures of school life. These young people believed that routines were not important and that they had little or no impact on their mental wellbeing.

The third theme was drawn from the participants' reflections on the post-Covid offer in schools. For one participant who had engaged with mental health support, there was a sense that the support had changed significantly since the pandemic. They observed that there was a lot more on offer for learners. There was a positive view of the improved communication between staff and pupils which had improved the way that they viewed staff and the support being offered by staff.

**Learning**

**Figure 4**
*Learning Themes and Findings from Data Collection*
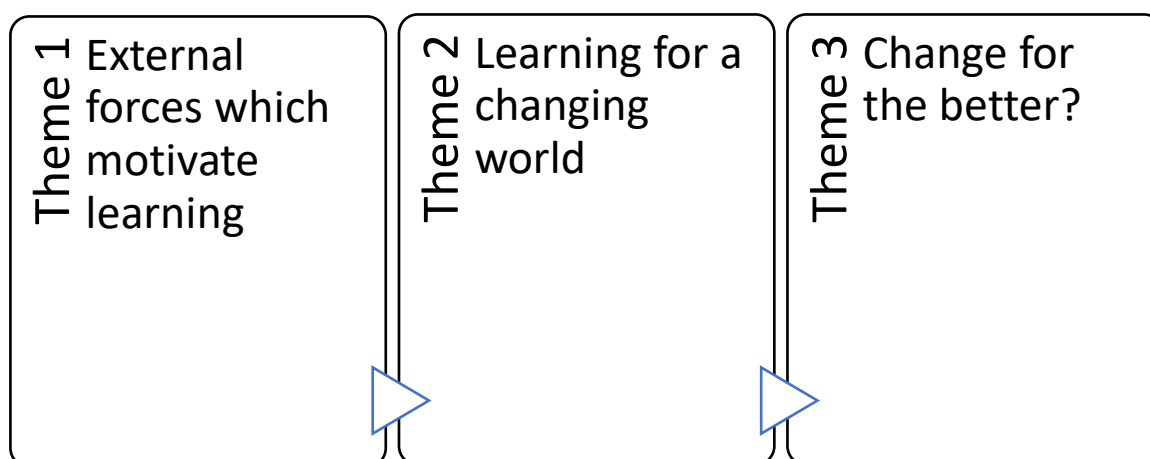


Theme 1 was drawn from the participants' comments on motivation for learning. The young people interviewed reflected that they had noticed a change, not in motivation itself but rather in how they were motivated and what they had learned about this during the time that they had to self-motivate when schools were closed.

Interestingly, this aspect really offered two perspectives. There was a clear sense that throughout the pandemic when lives were being lost and there was turbulence in all areas of life, young people felt a sense of pointlessness to learning – that learning was not going to change anything and that they were not in control of anything. Young people recognised their phones and social media as a non-motivating aspect of learning. They were reliant on devices and this was also where they were getting a lot of their information.

However, there was a clear thread that learning is a social activity and that young people view learning as being better when done together. Learning together motivates them and this was something that they really missed during the pandemic. Feedback from peers was certainly something that they had missed and this recognition underlines the importance of the pedagogy that the participants missed.

Learning theme 2 was drawn more from the surveys and required some probing questions. Participants were able to illuminate on some of the ideas around real-life contexts for learning. They recognised some of this in the curriculum but felt that they had become more connected to learning about the present world throughout the pandemic and that this wasn't always explicit in the curriculum they experienced at school. The participants suggested that the learning which was self-motivated by interest and current affairs is more successful in developing learning than that which is determined by teachers. In addition to current affairs they spoke about learning from adults in the home about their work and their finances which they saw as relevant and motivating learning experiences. Participants felt strongly that what we need to learn has changed since the pandemic. The world has changed and they have changed with it as a result, so have their learning needs.

What theme 3 highlighted were the positives in how the learning has changed since the pandemic. The use of digital technologies was highlighted as a positive. The learners were better able to communicate with their teachers (also highlighted in wellbeing theme 3). Learning was more controlled by the learner when digital was being used to support learning. Participants felt that the social aspect of learning needed to be recognised by teachers as an important part of the learning as it was one of the things which had been most missed – being able to work in groups and to solve problems together. This was both in terms of collaboration and in terms of competition which was an interesting contrast and seemed very relevant in terms of skills development.

## Conclusions and Recommendations

It is essential that we amplify the voices of learners in order to develop a culturally/socially relevant, learner led and skills driven curriculum. Empirical research with learners needs to continue as we traverse a new educational experience. Learners' views will help to shape the new approaches required to support effective pedagogies and practices and empower learners to determine what they learn and how they learn it. It could be that this supports improving attendance and engagement which have been problematic since 2020.

Current social norms which existed pre-pandemic but which are intensified in a post-pandemic society are having a negative effect on the wellbeing of learners. Developing social and emotional beings through a renewed focus in this aspect of their holistic education will offer learners the ability to better articulate their experiences both socially and educationally. But in order to do this with greatest effect, we need to empower learners to have a key role in the way we design curriculum.

In the aftermath of the pandemic, Scotland's education community recognised key issues such as our assessment system and took steps to address what we had learned through the Scottish Government (2023c) *It's our Future* report and *All Learners in Scotland Matter*: *The National Discussion on Education* (2023a), but while the research is there, we are yet to act on this in any meaningful way. Scottish education needs to be braver and more decisive in the actions it takes next. It should be acted upon by Qualifications Scotland the new organisation outlined in the Education (Scotland) Bill (2024). Wellbeing and learning must coexist in the curriculum alongside authentic engagement with learners in our next steps as an education system.

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# Exploring the Challenges at the Broad General Education to Senior Phase Transition in Scotland's Curriculum

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## Abstract

Since the implementation of Curriculum for Excellence (CfE) many secondary schools have modified their curricular structure, influenced by the requirement to deliver pupil entitlements and offer a Broad General Education (BGE) to the end of S3. The autonomy afforded to head teachers (HTs) offers schools significant flexibility in designing their curriculum, which has resulted in a range of curricular structures across Scotland.  However, many schools find it challenging to attain a balance between ensuring learners receive their entitlement to a BGE while also supporting progression to the Senior Phase (SP). This empirical research uses Glasgow secondary schools as a case study.  It seeks to understand the underlying reasons giving rise to this challenge, and how this impacts on curricular structures.  It concludes with recommendations for practice and policy to alleviate the challenge.

*Keywords:*  Curriculum for Excellence, Broad General Education (BGE), Senior Phase (SP), transition, curricular structures

## Introduction

Scottish education continues to experience an intense period of reform much of which, for over two decades, has been driven by Curriculum for Excellence (CfE) (Humes, 2020).  Introduced in 2010, CfE sought to ensure that all pupils were prepared for life in the 21st century through a coherent curriculum (Education Scotland, 2024) and was considered a ground-breaking change in education, both in its philosophy and in its practical implications for schools (Priestley & Humes, 2010). Between 2006 and 2011, a series of *Building the Curriculum* (BTC) documents was published detailing the requirements of CfE and providing guidance for its implementation.  The third of these (BTC3) (Scottish Government, 2008) outlined that pupils had an entitlement to:

- A broad, general education (BGE) including all experiences and outcomes (Es&Os) to the third level, across all curricular areas (CA), through to S3;
- A senior phase (SP) from S4 with opportunities to attain qualifications.

BTC3 also indicated that there would be no centrally-mandated curricular structure imposed by the Scottish Government. Rather, schools would have the flexibility and autonomy to create a curricular structure that suited their context and best met the needs of their pupils.

Another significant change was the introduction of a period of BGE to the end of S3.  Prior to CfE, secondary education in Scotland had traditionally run a period of general education until the end of S2, after which pupils would work towards qualifications at the appropriate level.  This is often referred to as a 2+2+2 curricular structure.  However, the implementation of CfE and the extended period of general education gave rise to a structure referred to as 3+3.  The differences between the two structures are outlined in Figure 1. As a result of this extended period of general education, the purpose of S3 changed from the first of a 2-year mid-school phase during which pupils worked towards exams, to the last of a 3-year, non-examinable, lower-school phase.

**Figure 1**
*The Organisation of Schooling Before 2010 (top), and Since 2010 (bottom)*

**2+2+2 Curriculum Structure pre-CfE (Pre-2010)**

| 5-14 | S3/S4 National Qualifications | S5/S6 National Qualifications |
|---|---|---|
| | *Standard Grade/Intermediate 1 & 2 /Access 1-3* | *Intermediate 1 & 2/Higher/Advanced Higher* |
| | (Courses last two academic years) | (Courses last one academic year) |



| S1 | S2 | S3 | S4 | S5 | S6 |
|---|---|---|---|---|---|
| 12-13yrs | 13-14yrs | 14-15yrs | 15-16yrs | 16-17yrs | 17-18yrs |

Broad General Education Phase                     Senior Phase

New National Qualifications

*National 3, 4, 5, Higher, Advanced Higher*

(Courses last one academic year)

**3+3 Curriculum Structure under CfE (since 2010)**

Note: Adapted from Shapira et al. (2023)

Several years after its launch, the implementation of CfE remains challenging (Priestley et al., 2021), with school leaders continuing to encounter a variety of difficulties. In 2020 Education Scotland reported that, in about 50% of Scotland's secondary schools, pupils were not receiving their full entitlement to a BGE, and that schools found it difficult to balance the requirement to provide learners with their entitlement to a BGE to the end of S3 with preparing them adequately for the SP (Education Scotland, 2020). This was reaffirmed in 2024 (Education Scotland, 2024). Little is known about *why* schools find it challenging to deliver all entitlements and achieve such a balance, and

Education Scotland does not provide any explanation or exploration. This study has sought to provide that exploration, and examines how the reported challenge impacts on the curriculum, particularly in S3. In doing so it seeks to partially fill the gap in available research on curricular structures in Scotland. It is guided by the following questions:

- What underlying factors have led to schools experiencing difficulty in achieving this balance?
- To what extent is the reported challenge being experienced in Glasgow secondary schools?
- What is the impact on curriculum design in Glasgow secondary schools?

These questions are of particular interest to the researcher, a HT of a secondary school in Glasgow, who has experienced the difficulties reported by Education Scotland.

## Literature Review

From the outset, CfE was under-conceptualised, with little input from academics, few insights from research, and no theoretical or intellectual basis for the proposed changes (Ford, 2011; Priestley et al., 2021). Fourteen years after initial implementation, there remains a paucity of research or data on curriculum structures in Scotland, and what little scrutiny exists is focused on the SP (Shapira et al., 2023).

A small body of literature provides a picture of the BGE and S3 curricula nationally. While formally part of the BGE, one purpose of S3 is to offer a transition point, and to prepare pupils for the SP (Education Scotland, 2012). However, as Stobart (2021) highlights, changing the examinable phase of secondary school to begin at S4 posed challenges for schools and pupils, who require 160 hours of learning to complete qualifications, potentially leading to the creation of another 2-term dash in S4 (Scott, 2019a). Comparing Scotland to other jurisdictions, a three-year lower secondary school phase followed by a three-year, examinable, SP is not uncommon. However, it is uncommon for pupils to undertake high-stakes exams after one year in the SP (UNESCO, 2011), and to take exams in each of the three years of the SP as currently happens in Scotland (Stobart, 2021). Scott (2019a) argues that concern over the scarce time available to complete qualifications, coupled with insufficient detail in BTC3 (Scottish Government, 2008), has resulted in uncertainty as to how best to use S3 to prepare pupils for the SP (Scott, 2015).  Similarly, research by Shapira et al. (2023) indicated that schools address the boundary between the BGE and SP in a range of ways, a consequence of the available autonomy.  Very often a *back-wash* effect is observed, with S3 being deployed to help pupils work towards National Qualifications (NQs) (Stobart, 2021).  This is supported by Shapira et al. (2023) who highlight that provision in the BGE often mirrors the requirements of Senior Phase qualifications.

Educators often favour the curricular status quo over proposed developments (Gouëdard et al., 2020), with resistance to change being stronger than the readiness to reform (OECD, 2020a). This has been witnessed to an extent in Scotland, where almost 20% of state-funded secondary schools continue to openly operate a traditional 2+2+2 curricular structure (Shapira et al. 2021). Furthermore, many supposed 3+3 structures look similar or identical to a pre-CfE model, and have been characterised as 2+2+2 structures in disguise (Scott, 2018).  The retention of a near-traditional approach may be viewed as curriculum-makers exhibiting resistance and conservatism (Scott, 2018). However, Scott (2019a) contends that nebulously worded policies and time-pressures to complete courses have led many schools to create a curriculum structure that provides a smooth approach to qualifications in S4.  As Stobart (2021) contends, exams have historically dominated the curriculum in S4-S6 in Scotland. Accordingly, CfE has been viewed as the implementation of new NQs, which now define CfE and have substituted it as the de facto curriculum in secondary schools. Consequently, the BGE has been largely disregarded (Priestley et al., 2021).

## Methodology

A case study approach was adopted, using secondary schools in Glasgow City Council (GCC) as case study sites.  Accordingly, the research employs a range of data collection methods to utilise all relevant and available evidence (Mfinanga et al., 2019). Following the literature review, the research was conducted through a survey followed by a focus group (FG) interview.

### Data Collection

The survey, conducted online using a Microsoft Form, contained a blend of closed and open-ended questions designed to provide an understanding of BGE curricular structures and rationales in Glasgow secondary schools.  It did not ask directly whether schools adopted a 3+3 or a 2+2+2 model as, while the two labels are helpful, they hide many nuances (Shapira et al., 2023). All Glasgow secondary HTs were invited to participate, with 28 from a possible 30 responding, ensuring a sufficiently large and representative sample. Responses were anonymous, and all participants provided consent for their involvement, in line with the ethical approval granted by the University of Glasgow.

The FG involved one interview with a group of five HTs who had completed the survey. The researcher posed two open-ended questions focussed on curriculum structures and rationales, allowing participants to discuss these in more depth.

### Data Analysis

An inductive data analysis process was employed, whereby the qualitative and quantitative data was examined multiple times, and subjected to interpretations, with themes being derived to create understandings that explained the data (Cohen, 2018).  These were then related to the research focus. Calculation of descriptive statistics of survey results was employed and findings are discussed in the following section with a focus on the general patterns emerging.

## Findings

### Survey Results

Tables 1 and 2 demonstrate that a wide variety of curricular structures exists within the BGE across Glasgow secondary schools.  The number of subjects studied within each BGE year group varies across the city, and schools offer different numbers of specialisation points, at different stages across the BGE.  The tables also highlight the range of ways in which learning is organised in S3, with a range of number of subjects being offered.  While 12 subjects (including *core*) is the most common number in the city, the average is 11.4 subjects.

**Table 1**
*Number of Subjects Studied and Specialisation Points in Each Year Group*

|  | S1 | S2 | S3 |
|---|---|---|---|
| **Min # subjects in GCC Schools** | 12 | 11 | 9 |
| **Max # subjects in GCC schools** | 21 | 21 | 15 |
| **Average # subjects in GCC schools** | 15.1 | 15.1 | 11.4 |
| **# schools with specialisation within this year** | 2 | 11 | 27 |

**Table 2**
*Number of Specialisation Points Within Each School*

| # specialisation points within the BGE | Schools (%) |
|---|---|
| 1 | 64% |
| 2 | 29% |
| 3 | 7% |

Figure 2 shows that the two most popular factors informing schools' curriculum rationales were raising attainment in the Senior Phase, and improving pupils' learning experiences, with nearly 80% of schools indicating one or both reasons. For three schools, raising attainment was the only reason given for their structure.  In three schools, parental pressure influenced the curriculum structure. Ten respondents highlighted that providing more time before options for NQs was a factor, and seven such schools offer two specialisation points during the BGE, at S2 and again S3, resulting in pupils reducing the number of subjects studied. Nearly 50% of respondents suggested that their curriculum model was, partially at least, directed by an obligation to comply with the perceived requirements of CfE. Of these, six do not compel students to choose one subject from each CA and five highlight that, for most pupils, their S3 curriculum is also followed in S4.

**Figure 2**
*Reasons Driving the Adoption of Curricular Model*
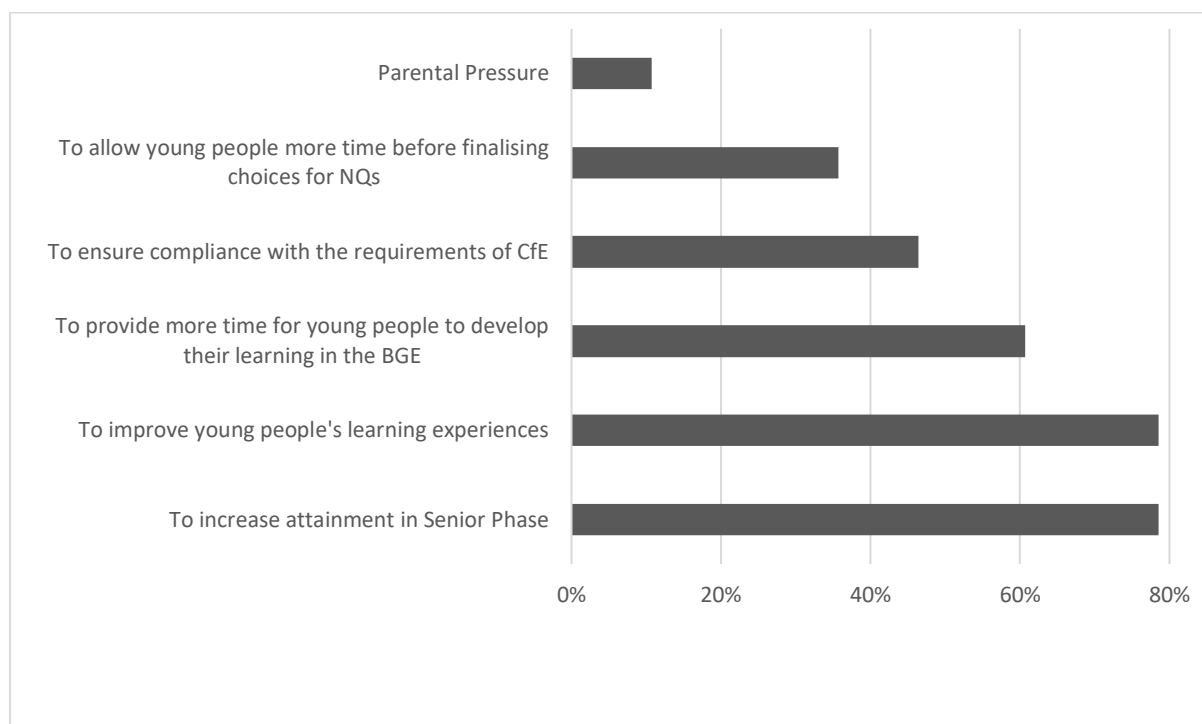


Schools place different restrictions on young people at specialisation points and these were explored to gain an understanding of the extent to which pupils were receiving their CfE entitlements. Table 3 details the responses of the participating schools and while some of the results may appear contradictory, it highlights that a significant number of Glasgow's young people are not studying in all CAs to the end of S3, and in some cases possibly earlier.

**Table 3**
*Conditions Placed on BGE Pupils at Specialisation Points*

| | Are pupils compelled to choose at least one subject from each CA? | Can pupils opt to study more than one subject within a CA? | Can pupils opt to study all subjects within a CA? | Can pupils opt to not study any subjects within a CA? |
|---|---|---|---|---|
| **No** | 29% | 4% | 75% | 50% |
| **Yes** | 71% | 96% | 25% | 50% |

With regards to what schools communicate as the purpose of S3, nine overarching themes emerged, with most responses comprising multiple themes. Figure 3 details the frequency with which each theme is mentioned by respondents. The most common theme was recognition that S3 was part of the BGE and that the learner experience should align with this.

**Figure 3**
*Communicated Purpose of S3*
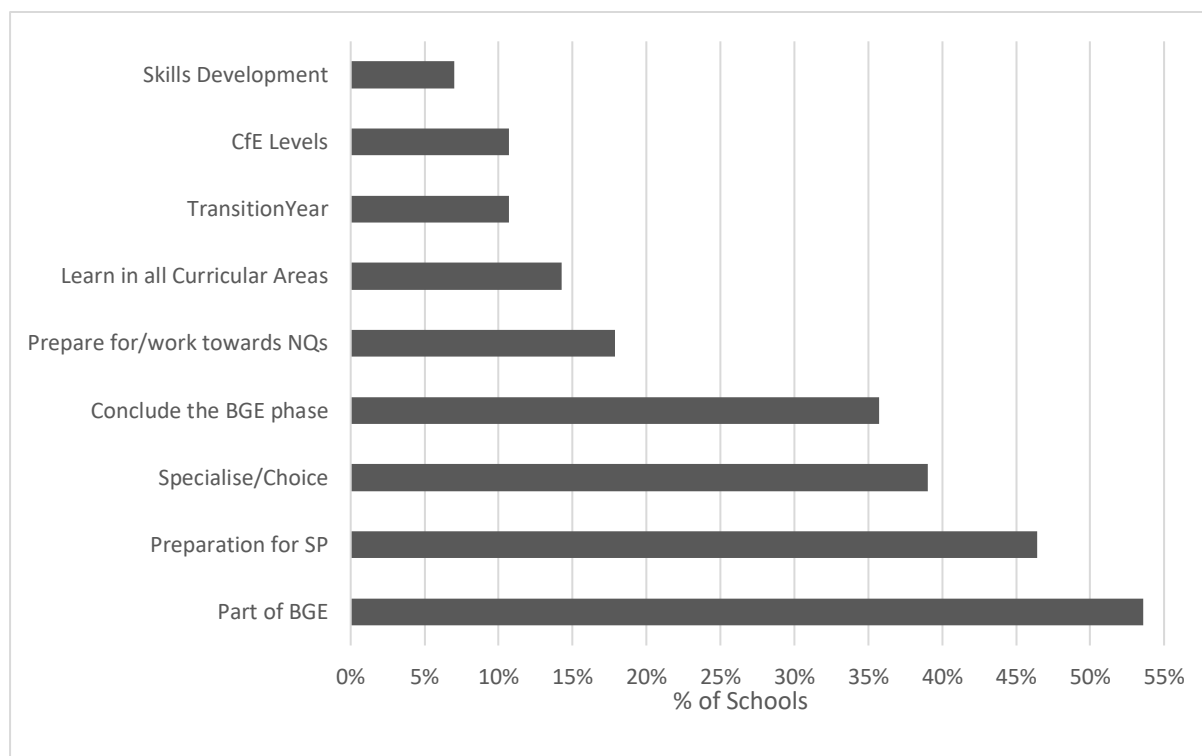


In order to understand the impact of specialisation, and personalisation and choice on pupils' curricular entitlements, it was necessary to establish whether learning in S3 was organised in discrete subjects, or in CAs. The overwhelming majority (93%) report that learning in S3 is organised in subjects (Figure 4).

**Figure 4**
*In S3, Is Learning Organised in Curriculum Areas or Discrete Subjects?*
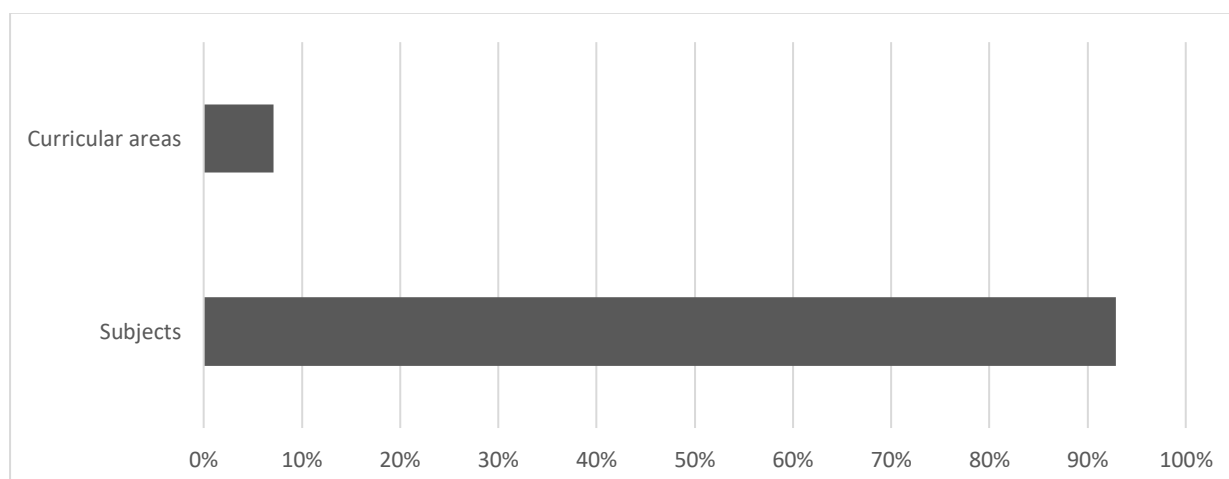
The study sought to establish how well the S3 pupil experience aligned with CfE requirements. The extent to which S3 learning, teaching, and assessment are influenced by NQs is detailed in Figure 5 and Figure 6. Fifty-four percent of respondents indicated that most S3 learning and teaching in their schools was planned around the learning outcomes (LOs) for NQs, while only 7% indicated that learning and teaching in S3 was not influenced by NQ LOs at all. Those schools whose S3 curricula are more shaped by NQs generally offer fewer subjects and are more inclined to plan assessment around NQ specifications in S3. Of the schools responding, 89% indicated that assessment in S3 was at least in part influenced by NQ LOs, while eight schools (27%) indicate that S3 assessment was focused entirely on NQ requirements.

**Figure 5**
*In S3, Is Learning Planned Around Learning Outcomes for National Qualifications?*
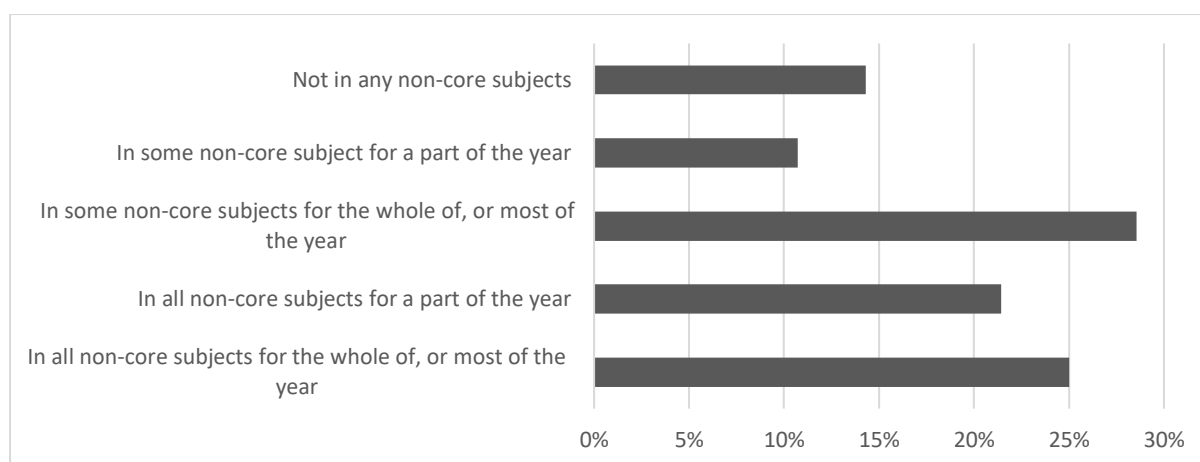


**Figure 6**
*In S3, Do Young People Undertake Assessments that are Designed Around Courses for National Qualifications?*
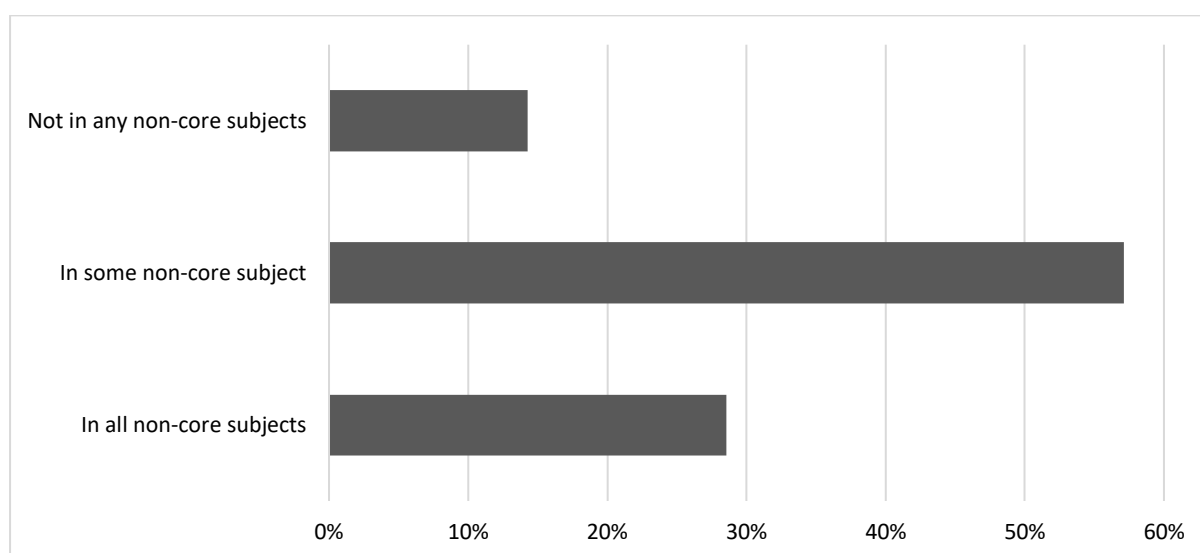


Nationally, many schools have a curricular structure that allows young people to choose subjects at the end of S3 (Shapira et al., 2023) allowing them to specialise in a smaller number of NQ subjects in S4. Participants in this research were asked how their curriculum in S3 compared to that in S4

(Figure 7).  While 61% of schools had a different structure in S3 compared to S4, 39% indicated that for most pupils their S3 curriculum was followed into S4, as was the norm in the pre-CfE era.

**Figure 7**
*How Many Young People Continue with Exactly the Same Set of Subjects when they Progress from S3 to S4?*
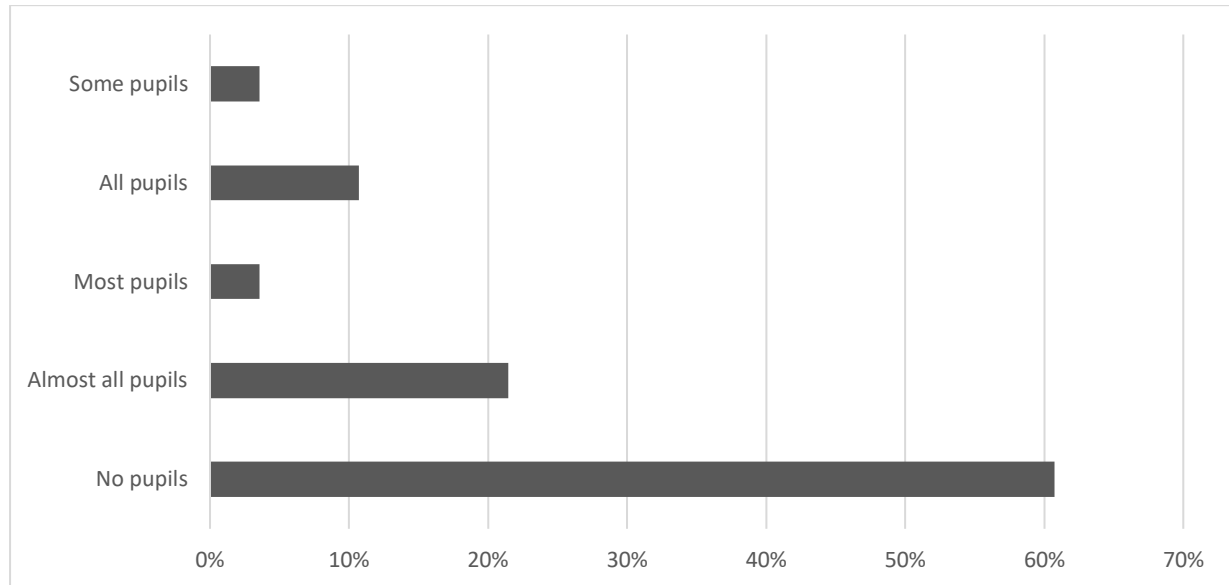


Participants were asked to rate how well their curriculum ensured pupils receive their entitlement to a BGE, including all third level Es&Os, across all CAs, through to S3.  The results (Figure 8) highlight that only 21% of schools confidently state that their curriculum delivers this entitlement, with 79% clearly struggling, like many others schools in Scotland, with achieving the balance.

**Figure 8**
*Which Statement Best Applies to Your BGE Curriculum?*
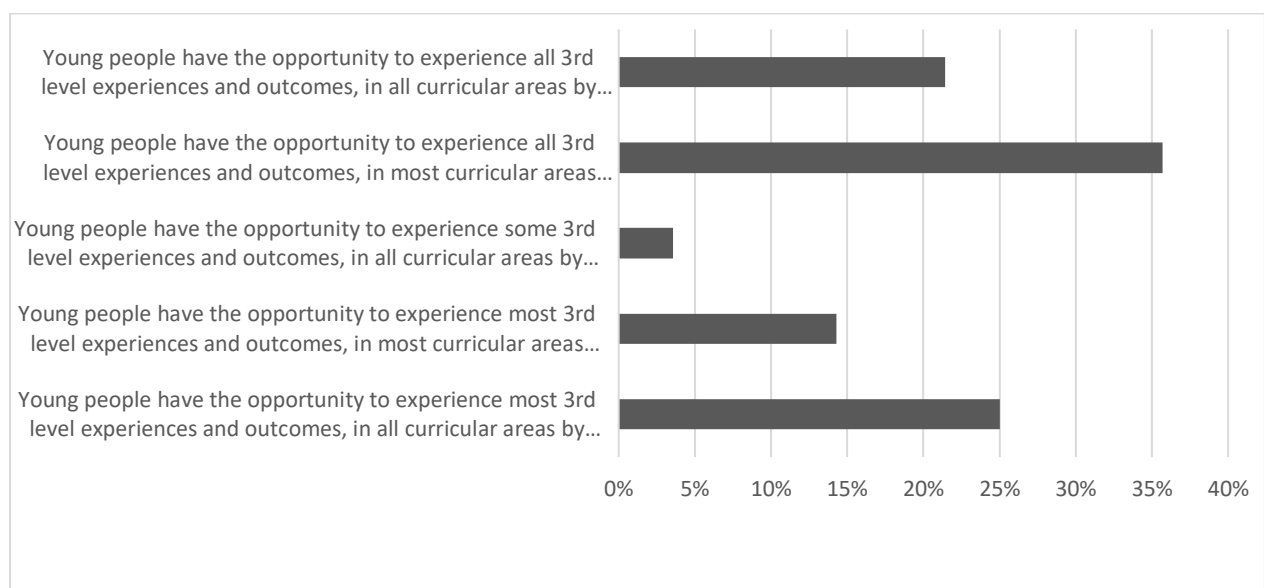
**Focus Group (FG)**

The themes emerging from the FG participants responses are summarised below:

*Attainment*

Maximising attainment was the principal consideration, followed by ensuring that pupils were prepared for the demands of study in the Senior Phase. As one FG participant stated: "A big driver in S3 is ensuring young people achieve five passes at level 5 in S4. This prevents a more radical approach to the BGE." Similarly, the need to prepare pupils for the SP by ensuring they had covered sufficient material before S4, and therefore avoiding the "two-term dash", featured significantly in responses.

*Education Scotland*

The influence of inspections, which is closely related to ensuring the curriculum complies with policy requirements, was a recurring theme. One participant testified:

> I initially developed a true BGE curriculum ensuring that young people learned in all CAs until the end of S3. Then His Majesty's Inspectorate for Education (HMIE) advised that we were not adequately preparing young people for the Senior Phase, so I had to change it.

However, all participants were unanimous that documents published by Education Scotland and the Scottish Government were not helpful in designing the curriculum.

*Other Considerations*

Two participants discussed how they provided young people with a free choice at specialisation points, which contributed to the difficulty reported by Education Scotland.

**Discussion**

**Competing Entitlements**

Pupils are entitled to experience all third level Es&Os in all CAs, and be offered opportunities for specialisation, and personalisation and choice (Scottish Government, 2008). Schools experience a tension in providing both. All surveyed schools in Glasgow offer opportunities for specialisation on at least one occasion in the BGE, with some offering more, which challenges research by Shapira et al. (2021) suggesting that BGE curricula lack opportunities for specialisation, personalisation, and choice. While some place certain parameters on the nature of the choices made, such as insisting that all young people select at least one subject from each CA, other schools offer pupils a greater degree of freedom, with at least two offering a completely free choice. Regardless of how many specialisation points are offered, or when these take place, the inclusion of any specialisation points reduces the number of subjects studied, which in turn reduces the number of Es&Os being covered. Ninety-three percent of GCC schools organise learning in S3 in discrete subjects, rather than broad CAs and, at specialisation points, pupils can opt to study, or indeed drop, one or more subject(s) within each CA. Unless a pupil has covered all third level Es&Os before specialising, the reduction in subjects studied is a barrier to the entitlement to a BGE to the end of S3. Findings from this study show that young people experience all third level Es&Os by the end of S3 in less than 25% of GCC schools, suggesting that this tension is being keenly felt in Glasgow. Shapira et al. (2021) reported

that schools which afford opportunities for specialising earlier in the BGE generally offered fewer subjects in their S3 curriculum.  Glasgow schools, with an average 11.4 subjects in S3, study fewer subjects than most schools in Scotland.  This supports existing research (ibid.) providing evidence of curricular narrowing in Scottish education and suggests that Glasgow is at the sharp end of this narrowing.

**Advice Documents**

FG participants were clear that CfE policy documents were not helpful with curriculum design. This contradicts the findings of Shapira et al. (2021) who report that such documents were at least moderately influential in the curriculum design of the majority of schools.  One problem in the early stages of CfE was that the concept was filtered through several groups of authors, who contributed during its many distinct development phases, as outlined in Figure 9.  Consequently, what CfE began to look like was not in keeping with the recommendations of the original 2004 report (Scott, 2015).

**Figure 9**
*The Early Development of Curriculum for Excellence*
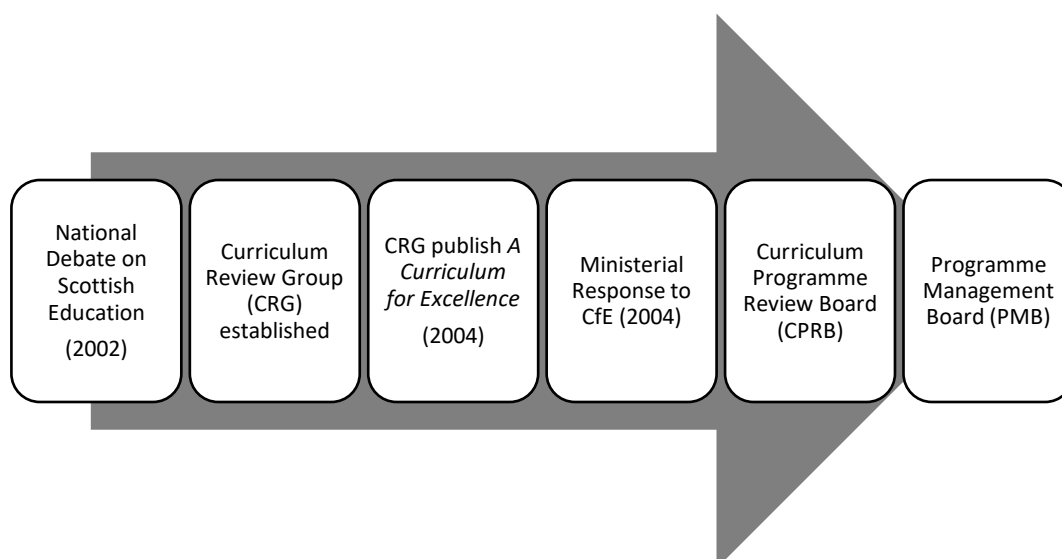


The requirements of CfE are not outlined in their entirety in a single document, but rather in a series of documents published over several years.  Of these, BTC3 (Scottish Government 2008) is the key document relating to curricular planning.  However, this did not provide any framework for the curriculum, or advice on how to structure the curriculum to implement the required changes.  This, and other CfE policy documents, have been described as "vague" (Scott, 2018) and not helpful to HTs (Scott, 2019b), which echoes findings in this research.

Findings suggest that CfE documents had led to different understandings of what is required to ensure a curriculum aligns with national policy. Forty-six percent of survey respondents indicated that their curriculum structure was, at least in part, informed by a desire to comply with the requirements of CfE.  However, 77% of these respondents state that young people do not experience all third level Es&Os in all CAs by the end of S3.  This is contrary to explicit CfE requirements (Scottish Government, 2008) and, in view of this, these schools' curricula appear not to meet the requirements of CfE.  This mis-alignment of school curricula and national guidance appears to be linked to the management of specialisation points.

The change in S3's status was outlined in CfE policy documents including Briefing Paper 6 (Education Scotland, 2012), which centred entirely on the S3 experience. This contained points of advice, but not direction, on how best to use S3, including those shown in Figure 10 (ibid; Education Scotland, 2016). This advice appears to be contradictory.  In addition, some points of advice appear mutually exclusive and it can be challenging for schools to satisfy them all.  HTs must use this advice to design a curriculum structure and a programme of learning that balances these contradictory messages, whilst also trying to ensure that young people receive their entitlements.  This is likely to have been a contributing factor to schools experiencing the difficulty reported by Education Scotland.

**Figure 10**
*Contradictory Advice Regarding S3*



**Learning in S3**

- Should prepare young people for the SP and qualifications in S4;

- Can and should contribute to learning for qualifications;

- Will be directly relevant to learning which will need to be demonstrated to gain a qualification;

- Can support the completion of some National 4 or National 5 Unit Outcomes or Assessment Standards.

**However, learning in S3**

- Will not form part of formal qualification courses (which will not begin before S4)

- Can and should be done without compromising the entitlement to a Broad General Education in S3

**Attainment and Performativity**

In designing their curriculum, HTs are aware of the need to maximise attainment, as found in both the survey and FG. Many look to S3 to directly support this, resulting in tension between raising attainment and young people's entitlements.  As Shapira et al. (2021) reported, data on pupil outcomes is very influential in informing decisions regarding BGE curricula in Scotland.  This is supported by the findings of this study, which highlight raising attainment in the SP was a key part of curriculum rationale in most Glasgow schools.  Only 14% of respondents stated that learning and teaching in S3 was not planned around NQ LOs or assessments at all. However, over 50% of schools surveyed indicated that most learning and teaching in S3 was planned around LOs for NQs.  These schools generally have lower numbers of subjects in their S3 curriculum, are more likely to plan assessments in S3 around NQ requirements, and place fewer restrictions on pupils' choices at specialisation points.  This aligns with the work by Stobart (2021) and Priestley et al. (2021) who highlight the extent to which exams and qualifications dominate learning, teaching, and the curriculum in Scotland, at the expense of the BGE experience.

Schools who report that their S3 experience is more heavily influenced by NQs are also more likely to be influenced by measures to raise attainment.  The tension between driving up attainment versus curricular entitlements is acknowledged in the literature, which shows that a "performativity agenda" – a desire to increase attainment to ensure a school is seen as performing well - is known to impact on learning and teaching (Gouëdard et al., 2020) and the curriculum (Priestley et al., 2021).  Moreover, in cultures of accountability and performativity, the curriculum may become de-prioritised (Peace-Hughes, 2020; Shapira et al. 2023).  The findings suggest that this tension is evident in most Glasgow schools.   Furthermore, schools where the S3 experience is more profoundly influenced by the requirements for NQs are key examples of the NQ specifications effectively becoming curriculum (Priestley et al., 2021; Stobart, 2021), and the observed backwash into S3.

The retention of a traditional approach to S3, whether by the adoption of a 2+2+2 structure, a 3+3 structure in name only, or due to NQ material dominating learning and teaching, has been attributed to the conservatism of educational leaders and parents (Scott, 2018).  And, as noted in the findings, some HTs highlighted the influence of parents on curricular structures.  However, this researcher contends that any conservatism may be attributable to a desire to avoid taking risks with young people's futures.

**Conclusion**

The purpose of this study was to explore underlying reasons why schools find it difficult to provide learners with their entitlement to a BGE to the end of S3 while also preparing them adequately for the SP. This difficulty is not of HTs' making, but they appear to have the responsibility for resolving it. Findings suggest the following possible explanations for the root of this difficulty:

- Glasgow HTs appear to have found policy documents unhelpful when engaging in curricular design. Advice can be open to interpretation and contradictory, especially in relation to S3. There also appears to be insufficient clarity regarding HMIE's expectations in relation to curriculum design.
- There is an intrinsic challenge in ensuring young people receive their entitlement to experience all Es&Os to third level, whilst simultaneously ensuring they have their entitlement to opportunities for personalisation, choice, and specialism in their curriculum. Provision of one entitlement can negate the provision of another.
- There remains significant pressure on schools to maximise and improve exam results.  This can result in decisions about curriculum design that compromise pupils' entitlement to a full BGE experience.

Glasgow secondary HTs appear to have engaged in significant efforts to design curricula that comply with the requirements of CfE and meet the needs of all young people.  However, as a consequence of the underlying reasons detailed above, the following is observed in Glasgow's secondary schools:

- A wide range of BGE curricular structures have been implemented. No two schools appear to have identical structures.  The number of subjects studied in each of the BGE years varies markedly, as does the number and the timing of specialisation points.  Similarly, a range of parameters is placed on young people at specialisation points across the city.
- In S3, pupils' experiences appear to vary.  Most pupils will make options as they move from S3 into S4, but a significant number continue their S3 curriculum into S4.  In addition, there is evidence that NQs have significant influence on learning, teaching, and assessment in S3, driven by a desire to secure the best attainment outcomes for young people. The back-wash effect is strong and it is not clear pupils' experiences in this transition year align with their entitlement to a BGE.

- Most schools report that not all young people receive all curricular entitlements by the end of S3.
- Therefore, the difficulties related to curricular entitlements and balance reported by Education Scotland appear to be evident in GCC schools.  Evidence suggests that this is experienced in more than 50% of GCC schools, which is above the national rate.

**Implications for Practice and Policy**

To reduce the difficulty reported by Education Scotland, they and the Scottish Government can:

- Review policy documents and reconsider contradictory advice regarding S3.  This could be achieved through a process of critical dialogue with HTs and other curriculum-makers at different levels in schools and local authorities.
- Clarify expectations regarding curricular structures and learning, teaching, and assessment in the BGE without compromising the empowerment agenda (Education Scotland, 2019) or HTs' entitlement to curricular autonomy.
- Provide exemplification for how schools can better achieve the balance between preparing pupils for the SP while providing their entitlement to a BGE to the end of S3, highlighting good practice where it exists.  This could be supported by local authorities through internal processes such as validated self-evaluation.
- Acknowledge the lack of a theoretical underpinning of CfE when evaluating schools' curricular structures and rationales.  Rather than expect schools to make curricular decisions for compliance reasons, Education Scotland should introduce approaches that ensure a balance of support and challenge towards curriculum standards and frameworks.

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# A Framework to Enhance Learner Participation through the Drama Curriculum

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## Abstract

The incorporation of the United Nations Convention on the Rights of the Child (UNCRC) into Scots Law in 2024, means that fulfilling children's rights and embedding them in Scotland's education system is a top priority. Article 12 mandates the right of the child to fully participate in decision-making around all matters affecting them. Despite a positive education policy context and a wealth of research highlighting the positive outcomes of learner participation, there continue to be challenges fulfilling policy intentions in practice. This paper aims to clarify the key concepts underpinning effective pupil participation and the contextual factors that support and undermine its success, specifically through Drama education. This paper highlights the importance of the prominence of Drama in the curriculum if we are to fulfil the aspirations of the UNCRC. The collaborative nature of Drama is the most emancipatory aspect, promoting a pedagogy of participation. Providing opportunities for learners to develop confidence and leadership skills in a low-risk environment prepares them for more formal shared decision-making out with the classroom.  It concludes with a framework to support leadership and evaluation of learner participation at departmental level, developing a participatory ethos from the inside out.

*Keywords:*  learner participation, drama curriculum, shared decision-making, pupil voice, pedagogy

## Introduction

There is an extensive body of literature which evidences the benefits of learner participation in schools. Learner focused benefits include; improved engagement, empowerment, and the development of transferable life skills (Mitra, 2018) and organisational benefits include; enhanced intergenerational relationships, better ethos and shared sense of community (Cross et al., 2014, Graham et al., 2018). While the education policy context in the country advocates the importance of learner participation, through a range of key policies, fulfilling these aspirations continues to be a challenge in Scottish schools (Cross et al., 2014; Hulme et al., 2011; Mannion et al., 2020). The Organisation for Economic Cooperation and Development report supports this, noting that learners' input does not appear to be taken into account enough in decision-making (2021, p.18). While there have been attempts to provide meaningful structures to ensure pupil voice is captured, many argue that the frameworks utilised in schools are outdated and in fact replacing the benefits of consequential dialogue and shared decision-making with practices that are tokenistic at best

(Fielding, 2001a; Hall, 2016, Hart, 1992; Jones & Hall 2021). There are also ethical concerns, noted by Mitra, when young people are not "authentic participants but instead symbols that the school, district and/or state is doing 'something'" (2018, p. 479). A recommendation in *The Learner Participation in Educational Settings (3-18)* guideline is that participation must be "intrinsic to everyday ways of working" and that educators must reflect on ways to better support learner participation in their schools. (Education Scotland, 2018, p. 7). This should begin with helping young people understand their rights and enabling them to contribute to all kinds of decision-making processes affecting their educational experiences.

This paper aims to provide clarity around the key concepts underpinning effective learner participation and contextual factors that support and undermine its success in Scottish schools. It does so by drawing on the discipline of Drama and examines how the Drama curriculum can equip young people with the skills and abilities to participate and lead effectively. Through the emergence of a new framework, it will develop clear guidance, rooted in research, to support planning, implementation and evaluation of learner participation at departmental level.

The study is framed by the following overarching research question:

What are the key concepts underpinning effective learner participation in Scottish schools?

The research question will be addressed through the following sub questions:

i)      How do contextual factors support or undermine effective learner participation?
ii)     How can educational professionals support and enable learners to participate?
iii)    To what extent can curriculum Drama equip young people with the knowledge and skills required to participate effectively?

**Scottish Education Policy underpinning Learner Participation**

The recent incorporation of the United Nations Convention of the Rights of the Child (1989) into Scots Law means that fulfilling children's rights, and embedding them in Scotland's education system, is non-negotiable. The right for children to be involved in all decisions that affect them is reflected in several key policy drivers that shape the way participation is enacted in Scottish schools. Learner participation is a key thread running through *How Good Is Our School* (4th ed.) (Education Scotland, 2015), which is a framework used nationally to help educational professionals implement self-evaluation at all levels. It promotes learners taking lead roles in school improvement procedures, a school culture committed to children's rights and developing positive relationships. Learner participation is a vital aspect of the Curriculum for Excellence (CfE). It advocates "opportunities to participate responsibly in decision-making, to contribute as leaders and role models" (Education Scotland, 2019, p. 3). The four capacities promote opportunities to acquire skills for learning, life and work and encourage learners to become "democratic citizens and active shapers of that world" (2019, p. 2). The *Getting it Right for Every Child* policy framework, seeks to support and enhance children and young people's wellbeing through an emphasis on individual needs, strengths, and ensuring every child's voice is heard and valued. This policy reflects a commitment to equity, children's rights, and participation in all decision-making processes affecting their lives (Scottish Government, 2015). An *Empowered System* identifies improved attainment, wellbeing and better school ethos as benefits of learner participation (Education Scotland, n.d.). The policy guideline encourages a rights-based approach, collaboration and mutual respect between all partners. The *Learner Participation in Educational Settings (3-18)* framework highlights that participation should not be limited to formal pupil councils and should be experienced by all learners. It identifies equal opportunities to participate, a rights-based approach, consequential dialogue and shared decision-making as the fundamental principles of learner participation. The document reiterates the

importance of communications between adults and young people which are "two-way, voluntary, sustained, deal with real concerns, and based on mutual respect and children's rights" (Education Scotland, 2018, p. 5).

Therefore, it could be said that the promotion of participation within current policy discourse is underpinned by four main educational priorities:

- The fulfilment of children's rights
- School Improvement
- Ensuring equity and excellence in education
- Citizenship education

Prioritising participation in Scottish schools aims to improve outcomes for learners and institutions, whilst nurturing a generation of informed, engaged citizens who are equipped to positively contribute to society and uphold principles of equality and respect.

**Issues in Practice**

Initially pupil voice was concerned with consulting young people on aspects of school life, and evaluating learning and teaching through structured, school improvement processes such as pupil councils, surveys and focus groups (Mannion et al., 2020; Whitty & Wisby, 2007). However, this led to concerns about whether learners' views were being listened to and acted upon by those involved in decision-making processes (Arnot & Reay, 2007; Lundy, 2007). Rudduck et al. (1995) highlighted the dangers of speaking on behalf of learners when meanings are refracted "through the lens of our own interests and concerns". Therefore, the agendas on which learners are invited to contribute, often diminish the potential for consequential dialogue with young people (Nelson, 2018). Some argue that pupil voice has become a tick box exercise, used to "fulfil externally mandated policy and framework requirements" (Jones & Hall, 2022, p. 574) and that pupils currently lack agency within traditional school structures and processes (Bovill et al., 2011; Fleming, 2015). There is consensus in the literature that when delivered in this way, pupil voice becomes another accountability measure and tokenistic form of democratic processes (Arnot & Reay, 2007; Fielding, 2011; Hart, 1992; Whitty and Wisby, 2007). Fielding proposed a more transformative approach, whereby learners and teachers work together in partnership. He argued that for participation to be meaningful it must be built on authentic engagement, dialogue and shared inquiry that is influential and leads to new improved practices (2004). When learners feel valued and can see their perspectives being acted upon, it develops their sense of agency and encourages further engagement (Cook-Sather et al., 2023).

**Curriculum Drama**

Drama education in Scotland is heavily influenced by the work of Paulo Freire and Augusto Boal. Freire advocated for education to be a transformative and liberating experience, empowering pupils to become active agents in their own learning and in society (1970). He developed the concept *critical pedagogy* in which learners are encouraged to engage critically with the world around them and to challenge dominant power structures. This is reflected in the CfE experiences and outcomes for Drama which stipulate opportunities for pupils to "express and communicate ideas, thoughts and feelings through drama" and "use drama to explore real and imaginary situations, helping me to understand my world" (Education Scotland, 2017, p. 7). One of his key ideas was the concept of dialogue, where both teachers and learners are active participants in the learning process "the teacher is no longer merely the one who teaches, but one who is himself taught in dialogue with the students" (Freire, 2000, p. 72).

Similarly, Boal believed that "theatre is a form of knowledge; it should and can also be a means of transforming society" (2008, p. 78). He developed *Theatre of the Oppressed*, a pedagogy which uses theatre as a tool for social and political change. Forum theatre explores issues of injustice and learners suggest alternative actions for the characters. This process is "not intended to provide answers but to encourage debate" amongst learners (Boal, 2008, p. 109). By presenting real-life scenarios and exploring different solutions, learners are encouraged to consider the perspectives of others and develop empathy. This process of enquiry enables learners to become active participants in their own learning, developing their critical thinking skills and sense of agency (Cook-Sather, 2006; Hammond, 2013; Jones & Hall, 2021).

## Methodology

This study utilised a systematic literature review. Taking such an approach can have "as much intellectual and practical value as collecting first-hand data. A thorough critical evaluation of existing research often leads to new insights" (Hart, 2001, p. 3). This approach was selected to synthesise and analyse the existing literature on learner participation, to provide a reliable summary of evidence and valuable insight to inform future practice. Although systematic reviews can utilise a vast range of literature sources, including grey literature and policy documents (Ridley, 2012), the decision was made to focus on the most relevant sources to ensure a realistic and manageable scope for this study. A similar approach to that used by Nguyen et al. was adopted, in which only sources from academic journals were selected as these have been thoroughly peer reviewed and thought to be credible sources (2019). This search strategy aimed to ensure that all relevant studies were captured, minimising the risk of missing important information (Ridley, 2012). The search strategy was designed to identify relevant studies for inclusion in this systematic review. Relevant key words related to the study such as "pupil voice", "learner participation" and "pupil leadership" were entered into ProQuest Academic, SCOPUS and all EBSCOhost research databases. These databases were selected due to their extensive coverage and to locate current research. Secondly, search queries using a combination of key words such as "drama and pupil voice", "drama and learner participation" and "transformative drama education" were entered to the same databases, using the same filters as above.

Twenty-four articles met the predetermined criteria and became the main body of data for this research. The next stage of the process was data extraction and appraisal. This involved systematically extracting relevant data from the shortlisted articles and appraising the methodological quality of the studies. To ensure the reliability and validity of the review findings and to make evidence-based recommendations for future practice (Booth et al., 2021) a customised data extraction form was developed, in line with standardised examples from the Cochrane Institute (2017) which helped to extract key information from the selected studies. It included the headings; "author", "date", "location", "study characteristics", "participants", "intervention details", and "key findings". This framework enabled all relevant information to be captured and ensured consistently when extracting data from each study. The data was analysed using reflexive thematic analysis, a qualitative approach which constructs patterns and develops emergent themes across a data set in order to produce a coherent interpretation of the data (Braun & Clarke, 2021). Braun and Clarke's six-stage process was used, which involved; familiarisation with the data, generating codes, constructing themes, revising and defining and reporting the analysis (2013). This flexible process involved iterative movement between the different stages allowing for rigorous exploration of the data, leading to insightful analysis.

**Findings**

**School Culture**

Studies conducted in secondary school settings, highlight lack of time and issues of performativity as the main barriers to successful learner participation (Cross et al., 2014, Hulme et al., 2011, Mayes et al., 2020). The immense pressure of academic achievement results in meaningful collaboration with learners being overlooked and replaced with preparation for summative examinations (Graham et al., 2018). However, some research highlights the connection between effective learner participation and improved attainment (Mannion et al., 2020). Pupil participation fosters critical thinking and problem-solving skills which can be applied in and beyond the classroom (Hulme et al., 2011). When learners feel their contributions are valued, they develop a sense of ownership over their education, leading to increased confidence, enthusiasm and willingness to strive for excellence (Hall, 2016). Some research also alludes to how learner's experiences of democratic processes in school enable them to develop skills, such as expression, negotiation and cooperation, preparing them to become active and informed citizens in society (Cross et al., 2014), a key aspiration of Curriculum for Excellence (Education Scotland, 2019). The most effective examples of learner participation are situated in a school culture, where pupils and teachers feel empowered to engage fully in decision-making processes (Graham et al., 2018). Schools which adopt a distributed model of participation identify enhanced engagement and motivation when pupils are taught about coordinating decision-making and plan implementation in their school. Learners openly discuss the need for trust, compromise and delegating responsibility as well as valuing discussion and explanation when decisions don't go their way. Similarly, Charteris and Smardon (2018) identify positive examples of pupil participation in schools where they have been taught about the structures, processes, knowledge and skills needed to initiate ideas and take responsibility. However, top down improvement initiatives and performance targets can influence school leaders' decisions about whether to persevere with the challenging culture work needed to embed authentic participation (Mayes et al., 2020). Therefore, its success often comes down to the value base of senior leaders (Cross et al., 2014; Hulme et al., 2011) and their commitment to ensuring that participation is high on the agenda, and systems are in place to support it.

**Intergenerational Dialogue through Creative Classroom Practice and Enquiry**

A key theme reoccurring in the research literature, is the importance of intergenerational dialogue between pupils and teachers, which is two-way, and built on mutual respect (Black & Mayes, 2020; Chilvers et al., 2019; Leat & Reid, 2012; Mayes et al., 2020). While seen as a valuable approach, both learners and teachers can find this a testy process, pointing to teachers feeling threatened by the potential impact of pupil feedback (Black & Mayes, 2020; Mayes et al., 2020) or the belief that pupil voice can be viewed as a mechanism for surveillance (Charteris & Smardon, 2018). On the other hand, learners report feeling uncomfortable critiquing their teachers and identify that teachers need to be open to pupil feedback and ready to make changes in light of it. (Graham et al., 2018; Hulme at al., 2011; Jones & Bubb, 2020). This type of relationship goes against the traditional power dynamic experienced in schools and learners call for greater equality with their teachers (Graham et al., 2018).

Participatory approaches, which allow teachers and learners to get to know each other and feel comfortable, can catalyse ongoing dialogue and become the groundwork for open and honest conversations about learning and teaching (Susinos & Haya, 2014). An important message emerging from the literature is the need to utilise more creative and inclusive forms of participatory practice (Chappell & Craft, 2011; Cook-Sather, 2019; Hajisoteriou et al., 2021; Hammond, 2013). Creative learning conversations flatten the usual hierarchical power relations found in schools and promote a sense of equality (Chappell & Craft, 2011). Creative activities which encourage intergenerational

collaboration also develop learners' skills in relation to effective dialogue, cooperation and deliberation.  A study which utilised forum theatre to elicit pupil voice, empowered pupils to express themselves through performance. Using drama techniques such as improvisation, problem solving, emotional awareness and imagination, pupils developed advocacy through means other than the spoken word (Hammond, 2013). Similarly, the use of collaborative storytelling to explore issues of social justice, highlighted how creative pedagogical interventions can foster children's critical thinking, create trusting relationships and develop expression and collaboration. Learners who participated, discussed how the programme had encouraged them to be more actively engaged and committed to promoting social justice in and beyond their school (Hajisoteriou et al., 2021). The collaborative and participant focused nature of Drama is the most emancipatory aspect which promotes a pedagogy of participation. Hammond (2013) argues the performing arts are significantly underutilised within educational settings and despite a developing evidence base, there still appears to be a world of opportunity.

**Shared Decision-making through Curriculum Reform and Research**

To be transformative, this intergenerational dialogue must be influential and lead to new, improved practices. This relies on learners sharing in the responsibility for the vision, processes and outcomes of improvement initiatives, ensuring school decision-making captures the needs of all parties (Charteris & Smardon, 2018). Despite a desire to engage in shared decision-making, teachers report uncertainty and lack of competence in how to include learners in such discussions (Hulme et al., 2011; Jones & Bubb, 2020). One method with positive results across several studies was a teacher-learner partnership approach to curriculum development. When pupils are actively engaged in sharing their opinions, ideas, and concerns, it empowers them to take ownership of their learning journey (Gibson et al., 2021). Using creative activities and materials relevant to the discipline to elicit deeper evaluation of course content and facilitate intergenerational dialogue results in enhanced critical skills, more accessible assessment frameworks, changes to teachers' thinking and enriched curriculum design (Chilvers et al., 2019). To facilitate feasible changes to practice, it is the role of the teacher to be transparent with learners about how decisions are made within an institution as well as time and financial implications (Cross et al., 2014). Understanding the complexities, constraints and tensions, is what enables learners and teachers, to find the possibilities that exist and generate innovative ideas (Mitra, 2018).

Pupil-led research, whereby pupils have worked collaboratively to plan, develop and implement their own improvement projects, has shed light on the true capabilities of young people (Gibson et al., 2021). Vital to this process was developing trusting relationships, teacher-pupil mentoring, co-designed decision-making and final recommendations based on changes the young people would like to see. A fundamental idea emerging from the literature is the need for educational professionals to "scaffold the development of students' participatory skills (such as negotiation, compromise, coordinating a plan, etc.)" (Graham et al., 2018, p. 1041). Teaching decision-making, through practice, and providing leadership opportunities that enable pupils to apply these skills, develops confidence, democratic values and shared responsibility. This mentoring approach helps to develop learners' understanding of how a school works as well as a range of new skills and sense of agency over their educational experience (Susinos & Haya, 2014).

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**Discussion**

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**Culture Shift**

The type of intergenerational collaboration propelled in policy goes against the traditional power hierarchies within educational settings, and most decision-making processes remain in the hands of senior leaders (Graham et al., 2018; Hulme et al., 2011). Listening to pupils is a transformative

process which will lead to reconfiguring the structure, processes and hierarchies of schools (Fielding, 2007). However, the evidence suggests that adults are still reluctant to change established practices and ways of working, mostly due to time, resources and focus on academic achievement. Addressing this challenge requires a culture shift. Educational leaders need to value participation as a key aspect of academic achievement and communicate this across their schools by disseminating research, coordinating a whole school approach and putting systems in place that enable it to flourish. Creative participatory approaches, such as drama, dilute the traditional hierarchies and power dynamics of schools, empowering learners to act (Biddulph, 2011). The creation of new pedagogical relationships and practices, underpinned by intergenerational learning, is arguably the first step in a greater presence of pupils in decision-making processes (Susinos & Haya, 2014). Previous literature has suggested that authentic learner participation requires strong pedagogical leadership and a school culture that values and supports it (Rudduck & Flutter, 2004). However, this review of literature has identified that modelling strong collaborative processes and acting upon pupil voice, in itself, contributes to the development of a whole school participatory ethos from the inside out (Cook-Sather 2019).

### Experiences in the Classroom Can Lead to More Formal Participation Across the School and Beyond

Embedding participatory practices in day-to-day classroom experiences helps move away from the opinion that participation is an opt-in exercise only available to an elite group of pupils (Susinos & Haya, 2014). A move towards collaborative learning in the classroom and embedded democratic processes ensures all voices are heard and empowers learners to use them. Engaging in personally relevant critical enquiry, has shown to enable pupils to question the fundamental habits and patterns of school, challenge injustices and impact their surroundings (Mitra, 2018). Providing opportunities to involve pupils in curriculum reform and design has also demonstrated very positive results such as enhanced intergenerational relationships, the development of creative and critical skills, as well as innovative pedagogical approaches to improve learning and teaching. Evident from the findings is the importance of teaching pupils to value deliberation, modelling appropriate behaviours and approaches and providing scaffolding that supports and enables learners to contribute (Mitra, 2018). Pupil experience of informal participation within the classroom, where there is less risk, can eventually lead to greater involvement in deliberate forums and whole school decision-making processes. Opportunities to develop confidence and learn collaborative skills through group work can then be applied to the more formal structures in and beyond school (Cross et al., 2014). Encouraging pupils to engage in dialogue and discussion about learning and teaching creates a pedagogical partnership which improves curriculum experiences as well as nurturing a democratic, rights-based approach to education (Hall, 2016; Souza et al., 2012).

### Classroom Drama Creates the Conditions for Effective Participation

The findings indicate that when pupils feel safe and connected to their teachers, they are more likely to express their thoughts, ask questions and share ideas without fear of judgement. This study has identified six key characteristics underpinning effective dialogue between teachers and learners including: trust, respect, exchange of ideas, debate, shared decision-making, and distributed action. When conducted in this way, there is a move from intergenerational dialogue to intergenerational learning, creating positive outcomes for learners, organisations, curriculum planning and staff development (Chappell & Craft, 2011; Fielding, 2001b; Fielding, 2007). Creative pedagogies have proven to be effective means of engaging pupils, enabling them to explore complex issues and themes and build confidence in their ability to communicate and collaborate. Role-play, improvisation, and other creative activities, enable pupils to explore issues of social justice, inequality, and discrimination, developing their understanding of different perspectives. By stepping into the shoes of different characters and exploring their thoughts and feelings, pupils develop empathy as well as critical thinking skills (Jones & Hall, 2021). Therefore, it could be argued that

classroom-based activities such as collaborative group work and creative pedagogy are key to laying the groundwork for more substantial forms of participation across the school (Cross et al., 2014). Optimising opportunities for all children to share their views is a fundamental right therefore, further exploration of how creative approaches can be utilised is essential (Hammond, 2013). This is in line with the new Scottish government guidance which aims to develop more creative means of embedding children's rights, such as music, art and drama. (Scottish Government, 2024).

**Enhancing Participation Through Drama**

A main objective of this research was to identify the key concepts underpinning effective participation in Scottish schools. The concepts identified in both Scottish education policy and the literature reviewed for this study are listed in Table 1.

**Table 1**
*Key Concepts Underpinning Effective Learner Participation* (synthesised by the researcher)

### *Effective Pupil Participation*

*School Improvement*

*Quality Assurance*

*Children's Rights*

*Citizenship*

*Transformative Leadership*

*Flat Power Dynamic*

*Positive Relationships*

*Intergenerational Dialogue and Learning*

*Collaboration*

*Communication*

*Expression*

*Creativity*

*Problem-solving*

*Critical Inquiry*

*Inclusivity*

*Empathy*

*Leadership*

*Reflection*

*Social Justice*

*Shared Decision-making*

*Evaluation*

Another objective of this research was to examine how curriculum Drama can support and enhance participation in Scottish schools by equipping learners with the knowledge and skills required to participate effectively. The key concepts underpinning the Drama curriculum in Scotland, are listed below in Table 2.

**Table 2.**
*Key Concepts Underpinning the Scottish Drama Curriculum (*synthesised by the researcher)

### *Drama Curriculum*

| |
|---|
| *Performance Skills* |
| *Production Skills* |
| *Performance Analysis* |
| *Collaboration* |
| *Communication* |
| *Expression* |
| *Creativity* |
| *Problem-solving* |
| *Reflection* |
| *Critical Inquiry* |
| *Children's Rights* |
| *Inclusivity* |
| *Empathy* |
| *Leadership* |
| *Constructive Feedback* |
| *Issue Based Drama* |
| *Alternative Course of Action* |
| *Shared Decision-making* |
| *Evaluation* |
| *Flat Power Dynamic* |
| *Positive Relationships* |
| *Intergenerational Dialogue and Learning* |

A key finding from this study is that the concepts underpinning effective learner participation in schools align closely with the skills developed through curriculum Drama. Figure 1 below attempts to synthesise both sets of concepts, illuminating many shared principles.

**Figure 1.**
*Synthesis of Underlying Concepts as Found in Policy and Research*
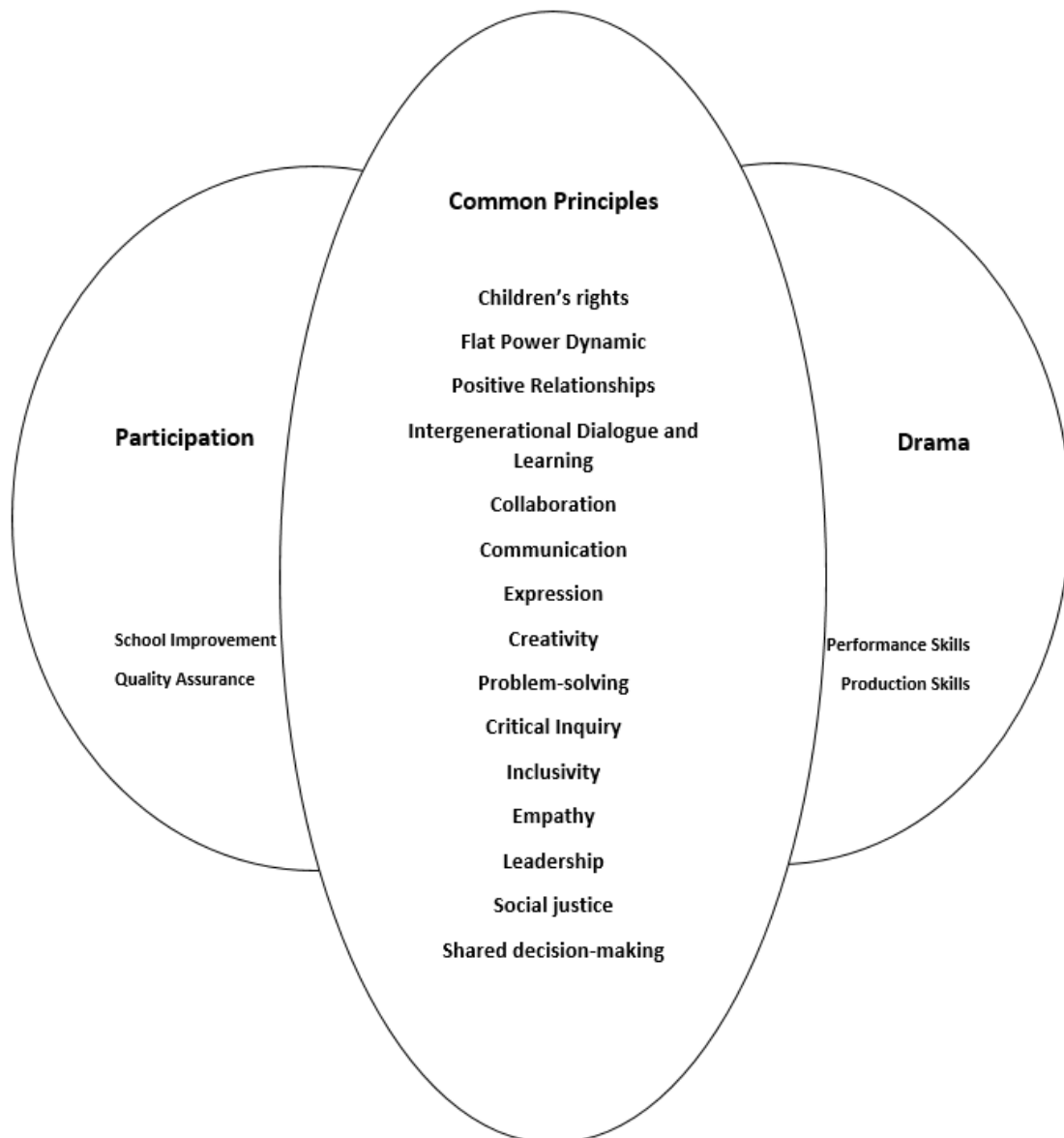


The diagram highlights that the key concepts underpinning effective learner participation are in fact embedded in the Scottish Drama Curriculum. Therefore, it could be argued that Drama is a powerful tool for enhancing learner participation in Scottish secondary schools as it:

- dilutes hierarchical power dynamics
- is built on collaboration and the exchange of ideas
- enables all learners to express themselves through verbal and non-verbal communication
- develops creativity, problem-solving and critical thinking skills
- enables intergenerational learning through critical inquiry
- empowers learners and teachers to challenge injustice
- encourages shared decision-making and responsibility

Drama provides a safe place to engage learners in authentic participation practices that lead to positive change.

**Developing a Framework of Practice**

The findings from this study and key aspects of literature and policy have been synthesised to develop a framework that endeavours to move beyond identifying concepts to providing a clear and accessible guide that will inform and enhance learner participation within a secondary school Drama department. Figure 2 shows the framework, which is expanded on the following pages. The guide aims to:

- raise awareness of learner participation
- highlight potential barriers and opportunities
- develop a shared rational and strategy for implementation
- promote the relational work that will determine its success
- suggest classroom based approaches that foster authentic learner participation
- identify evaluation processes that will enable sustainability

**How to Develop a Participatory Ethos in your Department: A Framework for Enhancing Learner Participation Practice**

**Figure 2**
*How to Develop a Participatory Ethos in your Department* (synthesis of findings)
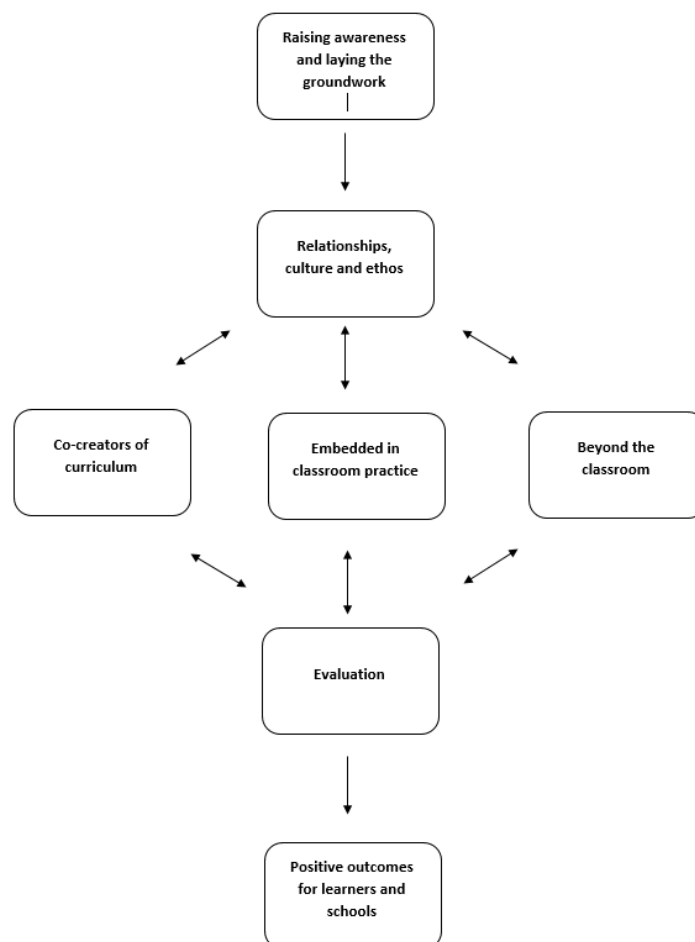
**Developing awareness and laying the groundwork (staff and pupils)**

- Provide a clear rationale and definition of learner participation based on policy and research.
- Reflect on current practice to identify contextual barriers, supports and opportunities.
- Establish a shared vision and responsibility for learner participation across the department.
- Develop a clear and accessible strategy for implementation.
- Promote and enable opportunities for professional learning.

**Relationships, culture and ethos**

Identify the importance of positive relationships that are built on principles of:

- Democratic values.
- Equality.
- Trust and mutual respect.
- Intergenerational dialogue and learning.
- Collaborative inquiry.
- Shared decision-making and collective responsibility.

**Co-creators of curriculum**

- Share curriculum frameworks.
- Be transparent about policy/school expectations, limitations and timelines.
- Use creative approaches to elicit pupil perspective and ideas.
- Engage in critical inquiry.
- Scaffold activities for pupils.
- Coach and mentor learners through this process.
- Implement learner suggestions.
- Involve learners in evaluating impact and establishing next steps.
- Recognise involvement in enhancing learning and teaching.

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**Embedded in classroom practice**

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*Suggestions based on research evidence. The list is neither prescriptive nor exhaustive.*

- Provide opportunities for collaborative group work.
- Promote democratic values and practice negotiation and shared decision-making in the classroom.
- Utilise drama activities such as games, improvisation, roleplay, and creative storytelling, enabling learners to develop communication, creativity, empathy, and critical thinking skills.
- Embed opportunities for personalisation choice and harness learners' interests and talents. This can be in relation to content, stimulus, form of theatrical expression and production role.
- Facilitate whole class productions where each learner has a vital role and feels valued.
- Offer a wide range of curricular pathways and vocational courses.
- Engage in inquiry based learning and mentor pupils through this process.
- Use Forum Theatre to explore issues of social justice and to establish alternative course of action.

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**Beyond the classroom**

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- Provide opportunities for pupil led research to be conducted and shared across the wider school.
- Use theatre performance to communicate important ideas.
- Provide opportunities for learners to participate and apply their leadership skills outwith the classroom such as extra-curricular drama clubs and performing arts events.

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**Evaluation**

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- Involve learners in evaluating impact and change.
- Identify progress, challenges and next steps.
- Involve learners in sharing good practice with other departments.
- Put systems in place to extend and improve practice across the school.

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**Positive outcomes for learners and schools**

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The recommendations above should work collectively towards the following outcomes:

- Improved relationships.
- Enhanced learning and teaching.
- Innovative curriculum design.
- Better ethos and sense of community.
- Improved engagement, empowerment and agency.
- Improved attainment and achievement.

**Conclusion**

This research concludes that a main barrier to authentic learner participation is the traditional hierarchies and power dynamics found in Scottish secondary schools. Issues of performativity continue to impact authentic collaboration with pupils, despite empirical evidence suggesting that the skills, attributes and mind-set developed through participatory practice enhance academic achievement. It is suggested that future studies provide more rigorous and methodologically sophisticated, empirical research on the impact of learner participation on attainment. Learner participation is most effective when situated in a school culture which values its contributions to school improvement, relationships, curriculum reform and learner agency. Factors which enhance its success include: a coordinated whole school approach with clear rationale, staff training, time and resources that support authentic intergenerational collaboration, and opportunities for shared-decision-making. A fundamental principle underpinning learner participation is intergenerational learning. This positive relationship built on trust and mutual respect ensures teachers and learners feel their contributions are valued, and encourages them to engage in conversations about school improvement that are influential. Creative activities such as Drama have proven to dilute these traditional relations and lay the groundwork for open and honest dialogue. Through the exchange of ideas, deliberation, transparency and distributed responsibility, learners and teachers can engage in shared decision-making processes that lead to positive change.

A key implication for policy and practice is helping educational professionals utilise creative pedagogy to foster a culture of participation. Learner participation must be embedded in the everyday practices of schools and experienced through pedagogical approaches used in the classroom. Providing opportunities for pupils to develop participatory skills in a low-risk environment prepares them for more formal shared decision-making out with the classroom. What is vital is that pupils are supported through this process using appropriately scaffolded activities. Strategies such as modelling democratic processes, collaborative group work, critical enquiry, forum theatre and performance elicit authentic pupil voice and create the conditions for critical engagement and exploration of issues of social justice.

This research advocates the true potential of Drama, not just as a subject but as a pedagogy that fosters the conditions, relationships and capacities that enable effective learner participation. Consequently, future empirical studies would benefit from focusing on the use of drama and other expressive art forms to enhance the general principal of participation, which plays a fundamental role in realising all the rights of the child.

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# Reflecting on a Strategic Change Initiative:
# Maximising the Capacity, Value and Impact of Support for Learning Workers

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## Abstract

This study was conducted as a key component of the Into Headship programme which I completed in 2022. The study examines the deployment of support for learning workers (SFLWs) in a Glasgow secondary school, while also addressing challenges that hinder effective collaboration between teaching staff and SFLWs that could enhance young people's learning experiences and outcomes. The study examines the feedback gathered to identify views and experiences of all stakeholders working with and alongside SFLWs in the school community.  It then reflects on the strategies employed while setting timelines and regularly reviewing progress with key staff responsible for leading and managing the SFLW team. The self-evaluation tool from the Education Endowment Fund (EEF), focusing on effective classroom assistant practices, and the Scottish Government 2020 review *Support for Learning: All Our Children and All Their Potential*, served as the foundation for this work. Both documents supported the exploration of structures and routines to better meet the needs of learners.

So far, the study has been valuable in fostering dialogue and reflection on how we can collaborate to improve outcomes for our young people while leading strategic changes involving SFLWs' responsibilities.  Some viewed this effort as too aspirational, given that it involves one of the lowest paid (UK Government, 2023) and often underappreciated (BBC, 2025) roles in the education system. As strategies were implemented, reviewed, and refined, a self-reflection journal emerged to help guide and sustain positive progress. Despite the challenges, this ambitious undertaking sheds some light on the untapped potential of SFLWs, offering a compelling vision for transforming the interrelationship of SFLWs and teachers for driving meaningful and lasting change.

*Keywords:* strategic change initiative (SCI), support for learning workers (SFLWs), collaboration, Education Endowment Fund (EEF)

## Introduction

I began my study on the deployment of support for learning workers (SFLWs) during my role as link depute head teacher for the Pupil Support department, where I reviewed the existing arrangements for SFLWs within my current context.

In my school context, we have two teams of SFLWs, one specifically for the co-located provision for young people with moderate learning difficulties, and the other team that works with the young people with additional support needs (ASN) as part of the mainstream cohort.  Although none of the approaches used by SFLWs could be considered ineffective, the absence of measurement of their

impact was apparent. When planning for next steps we evaluated specific interventions designed to support individual learning.  This proved challenging due to the non-existence of a formalised system for tracking or monitoring outcomes specific to the young people being supported.  As a result, there was limited evidence to demonstrate the effectiveness or value of SFLWs' deployment or specific support strategies. This lack of impact was highlighted during a post-Covid Education Scotland Recovery Visit to our school where it was reported that although strategies used to support our young people were commendable, there was insufficient evidence to gauge their impact or effectiveness.  Furthermore, Sosu and Ellis (2014) argue that having tangible measures as part of the implementation process would be most valuable.  The significance of this finding was clear in that it does not follow the recommendations of the Scottish Government 2020 review *Support for Learning: All Our Children and All Their Potential* (Scottish Government, 2020), which highlights the importance of "measuring the investment in Pupil Support Assistants" (p. 22), who play a key role in supporting learners. This underpinned the need for better evaluation.

The need for increased attention on the deployment of SFLWs for measurable positive impact was further substantiated by data provided by Insight, the Senior Phase benchmarking tool funded by the Scottish Government (2024a) to aid evaluation and improvement.  Insight indicates that the attainment of our young people with a recognised additional support need is lower than our virtual comparators[2].  This, together with the necessity of a measure of impact, resulted in what seemed a natural focus point for the strategic change initiative that I would lead through the Into Headship programme.

## Literature Review

*Achieving Excellence and Equity* (Scottish Government, 2022a) is a key principle underpinning Scottish education policy.  Central to the equity agenda is the theme of inclusion, which, although sometimes controversial due to conflicts in understanding of the term (Riddell, 2009) is fully supported by the *Additional Support for Learning Act* of 2004 (Scottish Parliament, 2004). This is further supported by a core principle of *The National Improvement Framework* (2022a) being improving outcomes for young people, regardless of their economic background or social status (Scottish Government, 2022c).

It is widely recognised that disparities in learning outcomes due to differences in household income are evident (Scottish Government, 2022a). Sosu and Ellis (2014) highlight that this inequality in Scottish households is more marked than that of many similar nations, reinforcing the Scottish Government's commitment to narrowing the poverty-related attainment gap within Scottish education (Scottish Government, 2022c). While excellent teaching and effective leadership are undoubtedly cornerstones of achieving equity in schools, as emphasised in *Putting Learners at the Centre* (Scottish Government, 2022b). I would also argue that the well-organised deployment of SFLWs plays a significant role in meeting this objective (Scottish Government, 2022a).

Supporting students with additional support needs (ASN) is crucial to closing the attainment gap (Scottish Government, 2017). In fact, the attainment gap between students with ASN and their peers is twice as large as the gap between students eligible for free school meals and their peers (Education Endowment Foundation, 2020). This stark reality further emphasises the importance of structured and effective support systems, such as SFLWs, in achieving equity for all students. It was through this observation that the Scottish Government boosted funding specifically for SFLWs particularly in view of the post-Covid effects on young people (Scottish Government, 2022c), indicating the value of SFLWs and the predicted impact on outcomes and raising attainment. With

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[2] Virtual Comparator is a sample group of pupils from other parts of Scotland who have similar characteristics to the young people in the school (Scottish Government, 2024a, p.5).

the noticeable rise in the number of young people with additional support needs in recent years (Riddell & Weedon, 2017) which are inherently complex to define, the Scottish Government has acknowledged this trend and committed to supporting the most disadvantaged young people (Scottish Government, 2022c). However, contradictorily it was also acknowledged that SFLWs can be susceptible to cost-saving actions (Scottish Government, 2017).

While raising attainment and closing the attainment gap in Scotland remain high priority, national policies aimed at improving outcomes are increasingly challenged by declining resources (Torrance & Forde, 2017). Recent budget cuts, along with further announced reductions, threaten the supports available for our most vulnerable young people. This reduction stands in plain contrast to the growing need for support, given the sustained increase in the number of young people with additional support needs (Scottish Government, 2023, p. 17).

Following extensive consultation, the review *Support for Learning: All Our Children and All Their Potential*, (Scottish Government, 2020) points to the strategies employed, and their effectiveness in embedding the Additional Support for Learning Act, 2004 (Scottish Parliament, 2004). This Scottish Government 2020 review is a practical read and guide for any teaching professional looking to support young people with barriers to their learning and maximise effectiveness of SFLWs and their interventions.  It is also a document that was, at times, overlooked, perhaps due to the timing of its launch and the post-Covid necessities that education establishments were grappling with.  That said, Professor Ken Muir, who advocated for a comprehensive reform of the Scottish education system (Scottish Government, 2022b), endorsed the Scottish Government 2020 review while speaking at the 2022 conference of the professional association School Leaders Scotland. Guiding the audience to it for advice and practical assistance, Professor Muir cited the review of ASN as "one of the most important documents in recent times" (Muir, 2022).

The recommendations from the review (Scottish Government, 2020) are reflected in the key drivers and justification that underpinned the focus of the work with the SFLWs in this study. These are:

1. "Review the deployment of Pupil Support Assistants, which takes account of recommendations from the current national research Education Endowment Fund" (p. 22)
2. "The investment in Pupil Support Assistants must be measured for impact and improvement on children and young people's experiences and achievements" (p. 22).
3. "The development of clear specifications for how classroom teacher and pupil support assistant roles interact and complement each other" (p. 45).

Work being undertaken by Education Scotland simultaneously with this study, involves rolling out the *Pupil Support Staff Engagement Programme* nationally (Education Scotland, 2022).  This Scottish discussion focusses on the Pupil Support workforce, aiming to gather input from all stakeholders involved in aiding learners to influence future direction of the personnel involved. Additionally, it aims to devise a full learning and development programme while extending supportive measures (Ross, 2022).  This investment must coincide with the deployment of SFLWs if they are to be empowered and be highly capable of working closely with young people who can, at times, present the most challenges. The role that SFLWs have in eliminating barriers to learning and consolidating the inclusive approach in classrooms is through the understanding they have for the learner they are working with (Scottish Government, 2020).  Young people prefer the notion that their SFLWs have a knowledge of them as individuals therefore the support was implemented appropriately and received more readily (Scottish Government, 2020).  Moreover, young people note that involvement in their planning to improve their attainment is something they also seek (Ross, 2022).  SFLWs often feel that their sense of being valued is not reciprocated in ways beyond solely their wages, including aspects of their roles such as training and investment (Scottish Government, 2020).

It is clear, then, that effective management of SFLWs, whether by senior managers or principal teachers, is essential for their successful deployment (Basford et al., 2017). Equally, the seamless partnership between SFLWs and classroom teachers is what is desired to promote the positive impact of their work (Jardi et al., 2022). However, time is a significant barrier that can hinder meaningful planning and collaboration between class teachers and SFLWs in addressing learner needs. Wilson et al. (2003) emphasise this practical challenge, noting that the lack of time for planning leads to limitations in the support provided. It is apparent that amidst the political agenda of raising attainment regardless of socioeconomic factors, some practical fundamentals are lacking consideration, which would ultimately aid steerage and increased positive outcomes for young people who need it most. There are inherent difficulties in addressing these issues (Scottish Government, 2020).

## Methodology and Method

Kotter's 8-Step Change Model (Kotter, 1996) was used for the strategic change initiative. First, this section outlines the steps in the model and how they were used. Second, this section goes on to describe and discuss the process of gathering feedback from all stakeholders.

**Using Kotter's 8-Step Change Model**

The strategic change initiative used Kotter's (1996) 8-step change model (Figure 1), which guided the planning steps and enabled a focussed approach in terms of the strategic direction and methods to be employed.

**Figure 1**
*Kotter's 8-Step Change Model (adapted)*
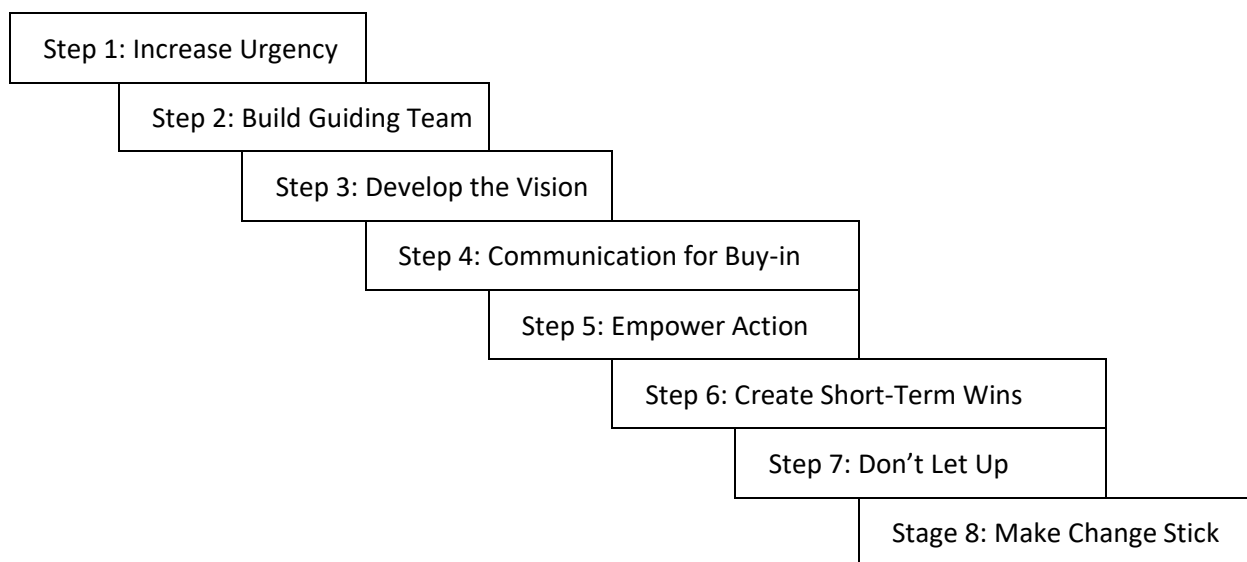


*Step 1 – Increase Urgency*

A strategic plan was developed to monitor the progress of the strategic change initiative, outlining specific timelines and goals.  Although the plan was designed with a focus on the initial stages, early feedback indicated that it was overly ambitious for the set timeframe. While Davies (2011) argues that a robust plan should span 3–5 years, I implemented short-term milestones so we could effectively evaluate the progress at key stages. This supported the notion of increased urgency.

*Step 2 – Build Guiding Team*

Sharing the initial vision and objectives with key personnel of the principal teachers (PTs) leading the teams of SFLWs.  This would be the core guiding team for the strategic change initiative.

*Step 3 – Develop the Vision*

Working collaboratively with the PTs we continued to work on the plan and the vision for the change.

*Step 4 – Communication for Buy-In*

Communication and clarity were key in ensuring all SFLWs were aware of the methods being used, moreover the reasons for them being implemented.   The PTs were part of this process.  Sharing the vision with the senior leadership team (SLT) was part of this process so they were aware of the objective of the work being undertaken.

*Step 5 - Empower Action*

The review and gathering of feedback was the most significant undertaking of the strategic change initiative.  The PTs were on board facilitating feedback sessions and questionnaires.  As Davies (2011) highlights, it is important not to lose sight of the long-term objective while short-term outcomes are met. However, this also exemplifies the significance of the vision being put into action (Davies, 2011).

*Step 6 – Create Short-Term Wins*

The short-term goals provided a platform for reflecting on development and examining the evidence to support the progress made towards the change for improvement (Scottish Government, 2020). Kotter illustrates this as he argues that "short term wins" (Kotter, 1996, p. 126) allow the teams to recognise that the change is having an impact and that there is real meaning behind the intention.  It was through Kotter's (1996) model (Figure 1) that I was able to reflect and take meaningful measures towards the change. However, as Bush and Glover (2014) contend that sustaining long-term positive change is more difficult than applying short term solutions to problems, I was cognisant of keeping the sustainability of the changes in view.

*Step 7 – Don't Let Up*

This involved the implementation stage of the systems being introduced to help monitor progress of interventions of support and review effectiveness. This required a level of determination and desire not to give up but to be mindful of the long-term objectives.

*Step 8 – Make Change Stick*

Making the change stick was a challenging aspect of long-term change and is an ongoing process.

**Stakeholder Views and Capturing Perspectives: The Process of Gathering Feedback**

In order to capture a wide range of perspectives, feedback was gathered from a range of stakeholders: PTs who lead the SFLW teams; the SLFWs in those teams; teaching staff who work alongside SFLWs; young people who have support through SFLWs; and the parents/carers of young people receiving support from SFLWs.

*Initial Stages of Gathering Feedback*

The first stages of the work undertaken in reviewing the deployment of SFLWs initially involved gathering the views of SFLWs, pupils who access support, and their parents/carers, and teaching staff.  This was concurrent with Levin (2000) who highlights that learners' views would have most impact with parents/carers and teachers, particularly so where there is the notion of change.

The guidance offered through the EEF was referred to and the support materials were adjusted considering my current context (Education Endowment Foundation, 2020).  This included sample questionnaires and a Guidance Report focused on achieving highly effective practice with SFLWs. These materials supported the creation of a baseline that served as a foundation, to underpin planning and next steps, and, especially, the measurement of the impact of support for young people accessing these supports (Scottish Government, 2020).

The questions across the questionnaires were largely the same, however separate versions were tailored for each group (staff, pupils, parents/carers) to ensure the questions were relevant to their specific roles, perspectives, and level of influence in the consultation process. All questionnaire responses remained anonymous because Grazulevicius et al (2021) indicate that this can facilitate a more honest response.

*Feedback from Young People Who Have Support Through SFLWs*

I was mindful that gathering pupil views can at times present challenges, particularly when personal experiences or views on a service offered by staff are being sought (Hume et al., 2011). However, in my school context and for the Support for Learning department it became an explicit area of strategic focus to be more deliberate and intentional regarding seeking pupil views on all decisions that affected them.

The importance of gathering pupil views has been at the fore of Scottish education since the early 2000's and particularly in view of *Curriculum for Excellence* introduced in 2004 (Scottish Government, 2004).  More recently, the legal status of the UNCRC (Scottish Government, 2024b) provides a framework for policy and practice (Daniels, 2022).  Nevertheless, young people with ASN "struggle" to have their voice heard (Scottish Government, 2020, p. 5, 2020, p. 133). Therefore, it was important to consider the challenges around gathering young people's views that would be of particular value for this area of focus.

While pupil feedback data is invaluable, one factor we must consider is our readiness for the honest views of the young people and how to act on the points they have raised (Ainscow & Messiou, 2018). This is supported by Education Scotland, who indicate the value of clarity with everyone involved about the changes being implemented as a result of consultation; this increases pupils' interest to be involved and participate in an honest manner (Education Scotland, 2018).

Florian et al. (2017) indicate that there can be frustrations around gathering meaningful views from young people, especially where ASN are evident, and they highlight the need to ensure the methods employed are appropriate.  Bragg (2007) outlines several of the most effective methods of gathering views, claiming group formats can remove inhibitions and encourage sharing or prompt ideas. As such, I hosted the group format as a forum for feedback around similar themes as the questionnaires and used a flip chart to note feedback as it was received, allowing everyone to see the contributions made. It was this method that proved most beneficial in collating feedback from our learners. Questionnaires were also created digitally on Microsoft Forms and completed by pupils. To ensure a fair representation, supports were put in place where necessary to allow full understanding of each question and completion of the evaluation (Florian et al., 2017).

*Feedback from Parents and Carers of Young People Receiving Support from SFLWs*

The Scottish Government 2020 review highlights that parents and carers are frustrated at the lack of opportunity to have their voices heard, arguing that their knowledge of their own child and what the child finds difficult is invaluable (Scottish Government, 2020). That said, when seeking parents' views for the strategic change initiative, the level of response from parents' and carers was fewer than anticipated and quite disappointing. Therefore, it was necessary to look at an alternative method to increase engagement.

*Feedback from Support for Learning Workers (SFLWs)*

The initial consultation with SFLWs involved a general reflection regarding meeting learners' needs in classrooms. They are present in many different curricular areas and supporting a number of different young people, so their view would be beneficial in creating a narrative for this purpose alone. This also provided a direct view on their perception of the working relationship between the classroom teacher which ultimately provides the foundation for effective collaboration (Sirkko et al., 2022). The second part of the consultation conducted with the SFLWs was based on self-reflection. The questionnaire asked them to identify their strengths and skills, and furthermore what type of barriers to learning did they think they were most skilled at assisting with. This information proved highly valuable, especially in later stages, as it enabled more effective assignment of SFLWs to support young people, ensuring their needs were more easily met. This is supported by the Scottish Government 2020 review, which emphasises that individuals working with young people with additional support needs must possess the appropriate skills to build the relationships necessary for providing effective support (Scottish Government, 2020).

*Feedback from Teaching Staff who Work Alongside SFLWs*

Class teachers who worked with SFLWs were specifically asked to return their questionnaire. The questions focussed on the teachers' understanding of the role of the SFLWs when supporting young people in their classes, giving valuable insight into their expectations of them.

## Findings and Discussion

This section shares and discusses the key findings of the study.

**Young People and Parents**

Overall, positive experiences from young people were highlighted.

As indicated in the previous section, the response from parents/carers was somewhat disappointing, and a wider school focus around parental engagement with feedback and evaluations is a future priority.

**SFLWs and Teachers**

*Key Findings*

The consultation feedback from SFLWs and teachers produced the following key findings:

1. More time is required between SFLWs and teachers for feedback and planning for young people.
2. Further clarity of and collaboration on expectations between SFLWs and teachers is required.

The partnership between support staff and the class teacher is crucial to supporting young people in classes, and the findings are reflected through MacIver et al. (2018) who argue that being inclusive in schools requires collaboration between teachers and support staff.  Furthermore, Sirkko et al. (2022) highlight that effective collaboration between teachers and school assistants requires careful planning and viewing them as a unified team.

*Action Planning and Implications for Practice with SFLWs and Teachers*

Creating time for the necessary or desired planning proved to be a challenge that could not be addressed at this stage of the strategic change initiative.  Reaching a middle ground for the interim, SFLWs would have pupil profiles detailing their learning needs and suggested strategies readily accessible as part of their materials, available for reference when needed. This pertinent information is already shared with all staff on the digital platform for Pupil Support.

Following preliminary consultations, it became apparent among the SFLWs that there was an element of confusion surrounding what had been shared by their PTs in advance of the first planned meeting that I was to chair.  There was a level of concern around the focus of the study and the rationale behind it, and views were that the focus was about the ineffectiveness of individual practice.  It was necessary for the main objective of the plan and their anticipated involvement to be clarified, as Robinson et al. (2007) outline this as an essential aspect of effective leadership.   It was also necessary to reassure the SFLW team and increase their trust in the purpose of the work being undertaken.  Chapman (2018) argues that building and maintaining trusting relationships is key to the sustainability of proposed outcomes.   This is also reflected in step 4 of Kotter's model for change (Kotter, 2013).

Furthermore, Robinson (2007) argues that leaders need to build trust with teachers who may have doubts about proposals being made.  Sun and Leithwood (2012) assert that trust is a key aspect of leadership, and they further clarify that trust allows risks to be explored and meaningful collaboration to take place to find a suitable solution. While this is a desirable factor in leadership style, one should consider how to grow capacity which will increase confidence and support the sustainability of this new approach (Harris, 2010).

Over the course of this work being undertaken, time has been spent with the SFLWs to support their desire to be involved in this positive change and elicit a degree of commitment to the changes in view (Kotter, 2013).   One would hope that the time spent with SFLWs as a team would support their feeling of being valued and their desire to work collaboratively.  That said, their perceived value is a picture that will need to be addressed in the future and will take time, through encouraged collaboration.  Sirkko et al. indicate that not being valued is a common concern amongst SFLWs (Sirkko et al., 2022).  Fullan (2020) contends that spending time with stakeholders provides the opportunity of being aware of any resistance to proposals, as there are times we can learn more from those who disagree, through the challenges they present - those who disagree are not necessarily resistant to change; sometimes their arguments can be reasonable and practical therefore promoting further thought.

**Moving to Step 5 – Empower Action**

This section explores and discusses the action points that were defined to progress the strategic change initiative to the empowering action stage (step 5) of Kotter's model for change, in view of the feedback gathered.

It is worth noting that while Biesta (2010) highlights that evidence-based change is prolific and has its place relating to educational matters, he contends that sifting through what is found and aligning it to values should be at the core of decision making (Biesta, 2010).

A key aspect of my vision was a strong commitment to enhancing the perceived value and recognition of SFLWs, both among themselves and among the staff they work with.

I believe the following identified action points reflect this, as they keep the needs of young people at the core while also enhancing the SFLWs' sense of value and self-worth.  The action points are:

1.  Introduce SFLW teams to school community and redefine title of role.

2.  Create staff and SFLWs' user-guide to support clarity of roles and expectations.

3.  Further develop means for monitoring progress made through SFLWs' interventions with young people.

The focus of the strategic change initiative motivated the PTs to take a more direct role of leadership with the SFLWs as a result of the feeling of empowerment and the desire to work collaboratively. Harris (2010) emphasises that there is increased buy-in when there is a commonality of values and I believe this to be the case as the SFLWs value this practice for the benefit of the young people.

The PTs have offered suggestions and progressed with elements of the change of their own accord. For example, they have initiated regular meetings with their teams and reflected on the effectiveness of supports in the classroom setting.  Training and development have always been a priority of the PTs and their desire to build capacity and skills is evident with the promotion of relevant CPD.

Research suggests that the sustainability of the main objectives could be upheld through work undertaken with the PTs.  As Hamilton et al. (2018) argue, the buy in for leadership roles will be promoted through "professional learning pathways that reflect their role, career patterns and aspirations" (Hamilton et al., 2018, p. 3). Furthermore, developing collaborative practice between SFLWs, teachers and PTs as a means of sustainability, as Mifsud and Day (2023) claim, will support engagement and help sustain positive impact on a school community. Chapman (2018) argues that building and maintaining trusting relationships is key to the sustainability of proposed outcomes.

While relationships are a large factor in my leadership approach, it is worth considering how this can build capacity that will increase confidence and support the sustainability of the change and future succession planning in a way that is more effective than relying on one leader (Harris, 2010). Further, clarity of vision and communication are both key to sustainable capacity building (MacBeath et al., 2008).   From this perspective, more regular communication has been established with the SFLW teams via email and in-person meetings.  The PT now has a briefing for a group of SFLWs to meet at the start of each week to review key information about events and individuals.  The reciprocal relationship of sharing information and seeking views or clarity regarding specific aspects of this change is moving towards being a natural part of their role.

### Progress to Date

The action points identified from the research are underway with full involvement from the SFLWs and PTs:

1.  Introduce SFLW teams to school community and redefine title of role:

a. A digital *Introduction to the SFLWs* has been produced with pictures and names of all SFLW staff.  This was printed in colour and shared with all staff for displaying on classroom walls.

b. The title of Support for Learning Worker was re-established for clarity of reference and role.  The title of Pupil Support Assistant (PSA), was no longer in use.

2. Create staff and SFLWs' user-guide to support clarity of roles and expectations:
   a. I created a digital user-guide which is in place following discussion with the SFLWs.
   b. These have been shared with the school community and have been well received, establishing this as a reference point for all involved with working with SFLWs.  The simplicity of this introduction has had a significant impact on teacher awareness and increased understanding of roles.  This would align with Kotter's model for change as step 6 highlights short term wins would be of value in implementing sustainable change (Kotter, 2013).

3. Further develop means for monitoring progress made through SFLWs' interventions with young people:
   a. An online and paper monitoring system has been established, and SFLWs are accessing this to record progress of young people they are supporting.
   b. Some aspects of implementation were not smooth, in terms of access and confidence of staff using the system.  However, with more attention paid to the use of the system, their fears were alleviated.
   c. This system will need reviewed for refinement, to ensure its robust in detail and accuracy of records.

### In Conclusion - Reflections on Leadership

When reviewing the progress made with this strategic change initiative, I am mindful that initial warnings indicated it was an ambitious undertaking, in a relatively short space of time.  While I was aware of this, I continued with the same focus, making necessary adjustments and reviewing progress regularly. That said, the work is ongoing with next steps in place and necessary planning to support this.  I reflect on the short-term wins and the necessary steps to continue the journey for continued positive change.   In one view, Daresh (1991) sums up reflective practice well, when he details that effectiveness (in school leadership) can be found when attention is paid to thoughtful and considerate reflection.  Furthermore, Baxter et al, (2021) highlight that through reflection, ongoing problem-solving is enabled. He also argues that this process should be central to the teaching profession.

Whether in my personal or professional endeavours, I consistently engage in self-reflection, always striving for improvement and seeking opportunities to enhance future outcomes.  My past instances of reflection, earlier in my career, align with the findings of Saric and Steh (2017), who suggest that feedback may not always contribute positively to personal growth.  Nevertheless, I continue to recognise the importance and significance of feedback in my professional development and with advancing ideas as where there is a willingness to learn, reflection can be productive (Saric & Steh, 2017).

I am confident that the efforts made thus far have already initiated positive transformation in addressing the needs of learners through the support offered by SFLWs.  I have established a goal for further enhancement in this area, and I observe a consistent commitment among the staff team to collectively pursue this positive aim.  I anticipate that this culture of collaboration fostered wherein

the concerted efforts of SFLWs combine with the class teachers, will enable young individuals to achieve their full potential.

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# Learning for All: Exploring the Relationship Between Inclusion and Achievement in a Primary Setting

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## Abstract

All education practitioners have a responsibility to support the participation and achievement of all children within learning communities – particularly within increasingly diverse societies. Inclusive pedagogy allows an exploration of what education practitioners believe, know and do, alongside the research literature on inclusive approaches to teaching, to support this participation and achievement. By utilising the Framework for Participation (Florian et al., 2017), this research aims to understand how the concepts of inclusion and achievement are constructed within a local primary school recognised as being inclusive of its diverse population. This single-site case study incorporated multiple methods of data collection, within an iterative process, and utilised deductive thematic analysis to draw key themes around what practitioners and the school community believe, know and do. The Framework for Participation allowed for an in-depth socio-cultural exploration of inclusion and achievement, including tensions and contradictions, which are highlighted. Ways in which this research methodology can complement and extend the reflective development of inclusive practices in schools are discussed.

*Keywords:* inclusion, achievement, primary school, Framework for Participation, diverse population

## Introduction

### National Context

The United Nations Convention on the Rights of the Child (UNCRC) (Incorporation) (Scotland) Act 2024 makes Scotland the first devolved nation in the world to directly incorporate the UNCRC into domestic law. This reflects a history of Scottish policy and legislation which respects, protects and fulfils children's rights, underpinned by values aligned to social justice and inclusive education.

Inclusive education should be of the highest priority for all those involved in education in Scotland (GTCS, 2022) and can be thought of as one in which a learner participates in school life, is accepted by peers, and progresses with learning (CIRCLE Collaboration, 2021; Scottish Government, 2019).

The Review *Support for Learning: All Our Children and All their Potential* (Scottish Government, 2020) highlighted that, with over 30% of children and young people now identified as having an additional support need, the concept of *mainstream* needs to be redefined and repositioned. When considering the concept of inclusion, the Review emphasised lived experience – informal and formal interactions and relationships, which combine to create the school community and culture.

Likewise, the concept of achievement has been crystalised within the Review with the recommendation that the successes and achievements of children and young people with additional support needs should be recognised, celebrated, and promoted, within a context of learning for life. The National Improvement Framework measures and sub-measures have been reviewed to ensure they provide an accurate understanding of the widest range of learners' achievements (Scottish Government, 2023), with individual progress, achievements and success measured from their own starting point. At the same time, the skills of professionals supporting these achievements should be made visible and recognised as valuable (Scottish Government, 2020).

**Glasgow Context**

Glasgow is a city host to around 30% of Scotland's most deprived areas, with almost 28,000 school-aged children and young people living in the most disadvantaged postcodes in Scotland (McKenna, 2020). It is also the most diverse city in Scotland, with the largest percentage of ethnic minority groups (12%) (Understanding Glasgow, 2011). The levels of poverty in the city, and subsequent attainment gap, provide a local context for the city's focus on nurturing approaches. The expectation across the city is that young people are educated in learning environments which are nurturing and inclusive.

Glasgow City Council Education Services Priorities for 2022-27 *All Learners, All Achieving*, outlines a vision where all learners in the city can participate, thrive, flourish and achieve. The local authority has committed to realising in practice Article 29 of the Convention of the Rights of the Child – prioritising the development of rights based, tolerant and respectful learning environments.

Therefore, both national and local policy promotes educational achievement and inclusion for all, with consideration turning to how meaningful participation might be evaluated. However, as Florian et al. (2017) reflect, the relationship between achievement and inclusion is complex.

**Inclusive Pedagogy**

Inclusive pedagogies reflect ideas about inclusion – but it is acknowledged to be a "messy" research concept (Koutsouris et al., 2023). Inclusive pedagogy extends the notion of teaching actions encapsulated by inclusive practice (Morina, 2020), to consider educators' knowledge, competence, actions, values and beliefs regarding pupils and the nature of teaching and learning, as well as social processes and influences (Alexander, 2004). Rouse's (2008) proposal that inclusion depends on what teachers know, do and believe was revisited by Florian (2014) who proposed an inclusive pedagogy model focused on what, how and why teachers engage in inclusive pedagogy.

Inclusive pedagogy has been defined as an approach to teaching and learning which provides meaningful education for all. As articulated by Florian et al. (2011), rather than an approach that works for *most* learners existing alongside something "additional" or "different" for those (*some*) who experience difficulties, inclusive pedagogy involves the development of a rich learning community characterised by learning opportunities that are sufficiently made available for everyone, so that *all* learners are able to participate in classroom life. This is a reaction to "bell-curve thinking" (Fendler & Muzaffar, 2008) which assumes an education system and curriculum designed for the majority – disadvantaging linguistic, cultural, cognitive and other kinds of difference (Florian, 2015;

Hitchcock et al., 2002).  Standardised assessments, league tables and competition are symptomatic of this ideology (Brennan et al., 2021).

Thus, individual differences between learners should be expected (see GTC Scotland, 2021) and participation within a community of learners, should be valued over judgements about what pupils can and cannot do (Florian & Black-Hawkins, 2011). However, inclusive pedagogy is an emerging area of research (Morina, 2020), and sits within a landscape rooted in definitional inconsistencies (Spratt & Florian, 2015) and subsequent limiting data-sets.  As a response to this, the Framework for Participation (see Black-Hawkins, 2010, 2014) was developed.  "This provides a systematic method for collecting detailed contextual evidence to explore the relationship between inclusion and achievement at the level of individual students, classes and schools, while taking into account the influence of broader issues of school cultures and values and beliefs" (Florian et al., 2017, p. 15).

**Overall Aim of Project**

Within this context of changing conceptualisations around inclusion and achievement it is timely to consider methodological work to produce new knowledge.  This research sought to explore and understand the concepts of inclusion and achievement within a local primary school with a diverse population, committed to the task of becoming more inclusive and celebrating achievement.

The research aimed to explore the underlying values and beliefs which shape the cultures, policies, practices and everyday interactions of the school.  Specifically, does the Framework for Participation capture the concepts of inclusion and achievement as understood and used by the community of X Primary School (XPS)?

It is hoped that interrogating the Framework for Participation in this way, will allow for others to use it when exploring their own inclusive environments and practices.

**Introducing X Primary School**

X Primary School (XPS) is a school for children in Glasgow.  The school has a co-located provision for children with additional support needs – Class One, Class Two and Class Three, located alongside their equivalent mainstream stage in the school.  Placement in the co-located provision is accessed through local authority processes.  There are 300 children on the school roll and there are 14 classes within the school, including the three within the co-located unit.

Of the pupils who attend the school, 73.8% have English as an additional language. Attendance is 88.5% and currently there are no children in the school who are care experienced.

The school has 29.2% of their children who live in SIMD[1] Decile 1 and 2– however this statistic is used with caution, as a member of staff explained, "We have many families living in private-let flats, where the postcode is not representative of their socio-economic status".

## Methodology

The research took a single-site case study approach that incorporated multiple methods of data collection, using the Framework for Participation (Florian et al., 2017) as a methodological lens to structure data collection and analysis.

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[1] The Scottish Index of Multiple Deprivation (SIMD) (Scottish Government, 2020) is a tool to identify areas of concentrated deprivation.

The research was carried out over a period of 18 months in XPS.  The school was selected for several reasons.  Its co-located provision for children with additional support needs identifies, at a purely structural level, some pupils as different from the mainstream.  However, staff at the school have strongly articulated their support of inclusive policies and practices – which was recognised in the school's Validated Self-Evaluation (VSE) Report, completed with Authority representatives in 2023.  The researchers were keen to explore how, within these structural demarcations, the school cultivates a community of learning for all.

The researchers gathered key documentation from the school including: attainment data; attendance records; the School Improvement Plan (SIP); Inclusive Differentiation Framework and Guidance; School Vision, Values and Aims; insight tracking data; and the recent VSE for co-located provision.

Six structured observations during different learning experiences and contexts, and across all stages, were undertaken with classes in the mainstream school and the co-located provision.  These classes were identified by the depute headteacher (DHT), in collaboration with the class teachers (CTs).  Following the observations, individual semi-structured interviews were carried out with each of the CTs.  This allowed us to ask follow-up questions and gave teachers an opportunity to talk about the rationale behind their practice.

Focus groups were carried out with the school's senior leadership team (SLT), CTs, support for learning workers (SfLWs) and parents/carers – each focus group had a similar structure and themes, but with specific questions tailored to the different groupings.  Participants volunteered to take part through discussions with the school SLT.  The CT focus group took place early in the new school term, to capture the views of newer staff members in terms of how the school ethos and belief system permeates.

A questionnaire was also distributed via Microsoft Forms to external partners who had connections with the school to gather their views.  The use of a questionnaire for this group was due to time constraints and to reduce pressure on the school's SLT.

As part of the iterative process, the questions for the focus groups and questionnaires were derived from the observations, the semi-structured interviews with CTs, and the Framework for Participation.  This ensured that questions and themes explored in the groups were relevant to the participants' context.

To access pupils' views, a variety of methods were used to ensure inclusivity – two separate groups of pupils from multiple stages across the mainstream school gave a school tour, pointing out spaces that were important to them.  A different sample of pupils from the mainstream school attended a focus group which was interactive and multisensory to support communication needs.  Pupils volunteered to be part of the group.  After discussion with SLT and teaching staff, the views of the pupils in the co-located provision were gathered through the adults they were comfortable with, using a variety of communication methods based on the children's needs.

Notes were taken by the researchers during most methods of data collection. The SLT, CT, SfLW and parent/carer focus groups were all audio recorded to capture their words directly.  One researcher facilitated in each of the groups, whilst the other(s) took note of the discussion. Researchers debriefed after each activity to triangulate the data collected and group under the main themes of the Framework for Participation.

Researchers used deductive thematic analysis to explore all data gathered. This utilised Braun and Clarke's (2006) six-phase process. Key areas were taken from the Framework for Participation to help understand the meaning behind the data, and themes were then moderated by the researchers.

**Findings and Discussion**

Inclusive pedagogy is a teaching and learning approach focused on beliefs, knowledge, design and actions, through which educators strive to include all pupils (Morina, 2020).  All four elements are vital to gaining insight into what inclusive adults do, as well as how and why they do it.  A parent of a child at XPS referenced the fact that, "as soon as you enter the school you get a feel of the values…the vibe…".  Similarly, in a different forum, a new teaching member of staff to the school felt that "you get a feeling and a vibe and you just kind of mould yourself in".  We found the Framework of Participation (Florian et al., 2017) to be a helpful constructivist tool in allowing us to build knowledge and understanding of how this "vibe" around inclusion and achievement is conceptualised and practiced in XPS.

**Beliefs**

*Love and Safety Are Key*

Staff, parents/carers, external organisations, and the pupils themselves, believed that the young people of the school were cared for, fully accepted and had something valuable to contribute to their learning.  One of the key aspirations the Head Teacher (HT) spoke of was that all children feel loved and cared for in the school.  Love is documented as the school's core value in the SIP and is felt by parents and carers – "…all staff show so much love" (Parent).  It is apparent that pupils felt known and valued by staff members – "[the adults] take into consideration what we say to them about things like lessons and trips or other things" (Pupil); "the teachers make me feel respected by encouraging me and making me feel good about myself and my work" (Pupil); "They [adults] love us as we are" (Pupil).

XPS have a strong, unified SLT.  The HT was often particularly mentioned as fitting the criteria of a *charismatic and transformational leader* – enabling staff to transcend self-interest and inspiring trust and risk-taking in pursuit of a compelling vision (Liao & Chuang, 2007).  The HT spoke openly around an explicit expectation that staff give all of themselves to the school's children, whilst being very cognisant of staff's capacity to do this, and the impact it has on staff wellbeing and mental health – some staff mentioned that they thought about work late into the night.  Indeed, this culture is so embedded within the school and its staff, both SLT and CTs made the observation that teaching staff who don't embrace it rarely stay long in the school, of their own choosing.

Parents said they, and their children, they felt "safe" in the school.  Teaching staff identified feeling safe when seeking help and support and that they trusted their colleagues – "I feel safe here as a teacher.  I feel trusted in my judgment as a teacher" (CT).  Teachers highlighted that SLT actively support a culture of safety, trust and autonomy, advocating learning and collaborating with colleagues – "I am able to be a teacher in my own way" (CT); "There's a trust when [an adult] comes into your room – you don't feel you'll be judged" (CT).  SLT emphasised that neurodiversity within the staff team, as well as the pupils, is celebrated. They take a strengths-based approach to leadership and model a process that supports staff to be the best of themselves.

*Accessible Learning for All*

The existence of the co-located provision is testament to "bell-curve thinking" (Fendler & Muzaffar, 2008) and "education's normative centre" (Youdell, 2006, p. 22).  It is the local authority's physical identification of children who require something additional or different to the majority.  Yet the school's *Inclusive Differentiation* policy quotes Carolyn Tomlinson (2017) – "Inclusive differentiation is

not, however, giving a 'normal' assignment to most students and 'different' assignments to students who are struggling or advanced.  Instead, 'offering multiple and varied avenues to learning is the hallmark of the kind of professional quality that denotes expertise' in meeting learners' needs".  SLT spoke of wrangling with the "dilemma of difference" around curriculum and placement – in other words, the negative implications that come from both recognising, and not recognising, differences when it comes to curriculum opportunities and school access.

This is reconciled within the school by conceptualising inclusion as believing that all children can learn and progress when the adults around them find the best approaches and conditions for this to happen – inclusion "is not something extra…it's just our job and actually, what's good for that child [with additional support needs] is likely going to be good for everybody" (CT).  Thus, the co-located provision was emphasised as a flexible, permeable space to support children.  Indeed, there was an emphasis on reclaiming *all* spaces in the school as learning spaces - "[The school] does not expect all children to learn in all environments" (DHT).  Taken to the extreme, the four walls of the classroom become an artificial boundary.

Parents/carers verbalised ideological conflict around accessing the curriculum for all, with the view that difference needs to be recognised, even if this means recognising that a mainstream educational experience cannot meet a child's needs.  The importance of participation was key – "having all children in the same room is not inclusion" (Parent).

We found the Framework helpful in teasing out these core beliefs around the nature of difference and participation.  We were able to understand how the school recognised that diversity is normal and valuable – championing every student within the learning environment and striving for equity of access despite structural demarcations.

*All Children Can Learn*

School staff verbalised a core belief that a child's capacity to learn is not fixed nor deterministic, rather the Vygotskian importance of social aspects of cognitive development was emphasised in the notion of the school as community – "we're a community in the classroom and all supporting each other…we all bring our own bits" (CT); "Achievement is how the whole family is made to feel in a school.  It's wider than education – it's feeling stronger" (Parent).

Both SLT and parents/carers spoke of their concerns with the notion of pupils, and indeed, by extension, teaching, being "on- or off-track".  SLT talked about ipsative tracking – viewing all their children as where they should be "within their own track", for some children, this just meant taking smaller steps than others.  This was expanded upon by CTs who articulated "all our children are 'on-track'" when comparing against their previous performance rather than each other.  They felt this linked with the four capacities of CfE and were clear that "differentiation goes beyond the level of academic ability" (CT) because they "see genius in everybody" (CT).  Parents appreciated this approach – "You can't standardise achievement, it looks totally different to everyone" (Parent).

*Valuing Everyone's Unique Contribution*

Another key belief that came through was the benefit to the whole learning community of valuing the participation of each individual (Spratt & Florian, 2015).  Teachers verbalised that one of the key tenets of their teaching is to "promote children to have a voice and feel confident in not just accepting things have to remain as they are" (CT).  Parents also felt that the school equipped their children with life skills to "navigate the world as a person of colour".  Diversity is celebrated and valued in a way that makes everyone richer for it.  "The culture and ethos of the school allows children to learn differently and not be judged" (CT); "I like working in this school as it gives

importance to children with additional support needs" (SfLW).  Pupils identified that their learning was important and was supported both by staff – "I like the way they [adults] let us [pupils] learn" (Pupil), as well as by other pupils "everyone that finds some things hard…sometimes I can help [pupil from Class Two] to find things easier'' (Pupil).  One of the DHTs used the phrase "warm demanding" in terms of the high expectations placed on all learners within the relational ethos of the school.

**Knowledge**

*Formative Assessment*

We were also able to unpick teachers' knowledge – their classroom strategies, organisational supports, modifying of instructional approaches, assessment of the needs of their pupils and how to support them with proactive planning.  In line with principles of formative assessment, we observed assessment being utilised throughout lessons as a tool to inform needs and extend learning – thus attending to individual differences during whole-class teaching in ways that avoided stigmatisation (Florian, 2014).  Both in upper and lower school lessons, clear learning intentions were displayed; children used *show me* whiteboards to monitor learning; tasks were chunked; open-ended activities ensured child-led learning; skilful mediating questions were asked (particularly the importance of transference from previous lessons); self-assessment was encouraged and feedback was provided.  Various different output modalities were used (written/iPad/whiteboard) so each child could work within their zone of proximal development.

*Staff Learning From Each Other*

The school strongly evidences itself as a learning organisation (see Kools et al., 2020) with knowledge dissemination and training provided in collaboration with, and based on the specific needs of, the staff themselves (Spear & Da Costa, 2018).  There was much evidence gathered of a collaborative learning approach taken by the adults working in the school toward meeting young people's needs.  SfLWs feel that they have "good communication with the SLT" and that they "are valued as an equal team member.  Teachers will ask for our opinion".   CTs spoke of there being "no hierarchy [with colleagues] when we're learning together".  The HT spoke of appreciating the team's strengths and interests, exploring how "teachers' skills can fit into the school".

We heard about professional discussions where teachers within the mainstream classes and those within the co-located provision worked in partnership to support learners – co-constructing knowledge and working together to seek new approaches.  Difficulties in learning were teaching problems to be solved (Florian, 2014).  CTs viewed the opportunity to support children with more complex additional support needs within the school building as a privilege in terms of supporting their own practice.  There is an emphasis on all staff, mainstream and those in the provision, working together and supporting each other.  This includes sharing ideas, resources, learning intentions, targets and strategies across the school.  Indeed, the teaching staff spoke of the pupils are being "shared" – "it's about having conversations and actually just thinking about the needs of the children…how can we work together to support this…" (CT).  Indeed, new members of staff are encouraged to spend time in Classes One, Two and Three to strengthen their mindset that these classes are part of the whole school approach.

This sharing of ideas between school staff so that teachers are aware of colleagues' capabilities, alongside high, positive expectations of practice, can support *collective efficacy* – teachers with positive perceptions about the level of competency of the school as a whole have higher beliefs in their own ability (Wilson et al., 2020).

*Listening to Community and Cultural Competence*

The school is keenly aware of itself as a denominational school at the heart of its community, which comprises predominantly BPOC[2] families – this is something which the HT acknowledges has been a relationship 10 years in the making.  It is recognised by parents/carers who spoke of "finding a home" in the school, with the HT "…listening and hearing what's going on in the community" (Parent); "The Muslim voice is celebrated in XPS" (Parent).

The teaching staff are predominantly white and are acutely aware of the sensitivity inherent within this - there is cognisance given of how "it is very important for the children to see staff who are Muslim" (CT).  Staff communicate an attitude of respect and learning with regard to the cultures of their pupils – they facilitate opportunities for these, at times difficult, conversations.  "We, as a staff, learn so much from the children about culture" (CT).  "It's about being humble enough to say 'I'm sorry, I got that wrong', and learn from the children…let them teach you" (CT).

The school recently undertook a project with local authors to explore the cultural diversity of characters used in children's creative writing - "It's been a long journey…tricky too…just finding publishers that provide a list of diverse books that include children in the provision; children with different family backgrounds…but I think now we're starting to see the outcome of it, and it's exciting…you can see children empowered to hold their heritage up…write about it and be proud of it." (CT).  Ongoing training, self-reflection and challenge ensures staff navigate the delicate balance between performative (motivated by personal needs rather than by a genuine concern for the disadvantaged group), and effective allyship (Kutlaca & Radke, 2022).  Although XPS's practice of accepting and celebrating their children's diversity was valued by parents, there was acknowledgment of the wider systems within which the school operates – "Inclusion within schools should extend to the Authority – but there, people don't look like me" (Parent).

The Framework supported this nuanced understanding of community and "the complex experiences and interactions which are the reality of children's lives" (Alexander, 2010, p. 115).

**Action**

*Universal Design for Learning*

The school identifies its pedagogical design to be aligned with the principles of Universal Design for Learning (UDL) (Tomlinson, 2017) – recognising the different needs in a classroom, and planning actions that respond to these.  The affective; recognition and strategic pillars of the UDL framework were evidenced in classroom observations and echoed the class-based examples overviewed in Sewell et al. (2022).  SLT gave examples of *teaching up* - basing their teaching focus on what the most advanced learners are doing (who, they argue, traditionally have the richest experience) and then taking time to explore what needs to be adapted to enable everyone to participate and succeed.  We observed flexibility within classroom teaching and accessible lessons which responded to all students' requirements (Sherrington, 2019), with tasks and objectives aligned to learning goals (Hall et al., 2003).  Flexibility ensured a pupil-centred environment that did not place emphasis on ability-based learning (Losberg & Zwozdiak-Myers, 2024) and made use of a variety of environments and contexts for learning experiences.  It was observed that children can get choices in their learning and their learning environment – "For some learners…for example, putting a jotter down in front of them is not the best way to be able to see what they can do" (CT).  A flexible strength-based approach was

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[2] black and people of colour

observed with some pupils who required some environmental adaptations – for example, they had a degree of control over when to take a brain break; where to sit; the choice of learning task; the choice of learning materials; involvement in choosing future topics.  "Orderly flexibility" is a key principle through which SLT encourage CTs to create differentiated classrooms.  "That sense of agency that the kids have is really important because it makes them feel like part of their own learning" (CT).

Staff showed awareness of the sensitivity needed to ensure that differentiated options do not limit learning opportunity.  "Differentiation goes beyond just the level of academic ability that is required to do something.  You can differentiate by process…by choice and interest.  I think that when you widen that approach to differentiation it just automatically becomes more inclusive and makes learning more meaningful" (CT).

*Creating Communities of Learners*

We observed lessons which involved all children (as opposed to a *most and some* approach) working together in social (rather than ability) groupings on a collaborative task.  Observations in classrooms showed CTs changing groups when the dynamic wasn't working – the children appeared comfortable and familiar with this.  "We don't have set groups in the traditional sense…our groups are flexible and change around a lot…we often use mixed ability groups to help scaffold for other learners" (CT).  The pupils themselves were able to identify some of these actions – for example, flexible groupings, cooperative learning activities, visual supports, meaningful learning tasks – highlighting how embedded they are in practice.  Pupils displayed pride when pointing out library books with characters who "look like us", or books written by BPOC authors.  In observations, it was noted that adult voice did not dominate learning experiences – there was reciprocity and a turn-taking element between adult and child voice.  Lessons were observed where the views of individuals were valued and became learning opportunities for everyone – teachers can use what they learn from listening to pupils' self-assessments of learning in ways that meet the standard of inclusive pedagogy (Florian & Beaton, 2018).  At the beginning of the school year, staff use the CIRCLE resources to look at their classroom environment and the various learning needs of the children coming into their class, to explore where adaptations may need to be made.

However, within the school, we also observed and spoke to teachers about practice where specific strategies were in place, particularly in the co-located provision, that were agreed as supportive to an individual child's needs but, in the context of inclusive pedagogy, could be considered exclusionary.  This reflects Lindsay et al.'s (2014) findings in terms of applying an inclusive pedagogy framework to learners with complex needs, and Brennan et al.'s (2021) acknowledgement that there are cases where individualised strategies are necessary.  It links back to the "dilemma of difference" that the school's SLT spoke at length around (Norwich & Koutsouris, 2020).

*Meaningful Data*

The local authority require disaggregated attainment data for the pupils in the mainstream school and those who attend the co-located provision.  However, the HT spoke of an ideological struggle with this and a desire not to separate the data as, although it would lower their attainment statistics, it would be a statement of the SLT's belief that *all* their children are making progress, and this progress cannot be measured off arbitrary benchmarks.  Of far greater meaning is the data story (which the school do not disaggregate) behind the stark figures.

The parents/carers questioned shared a similar stance with regard to pitching their children against standardised measures, but took a different perspective of it – feeling that if their child was in the

provision they should not be measured from mainstream benchmarks, as it served only to make them "feel worse as parents".

These actions are testament to how the school reacts against "bell-curve thinking" (Fendler & Muzaffar, 2008), celebrates difference and accommodates for variations so that all individuals can achieve.  However, the tensions within this in terms of reporting data required by the Authority, as well as practices expected by school inspectorate teams, are indicative of discussions taking place across education.  They evidence a need for schools to be given permission to do things differently in order to fully put into practice those policy aspirations which aim to put the child at the centre, adopt an asset-based approach and measure achievement in the broadest sense.

*Respectful Relationships*

Fundamental to the school, is the emotional and affective component of the way in which teaching was carried out (Morina, 2020). The HT spoke about staff with considerable admiration for the hard-work, energy, care and knowledge they demonstrated, which was reciprocal.  All staff groups questioned – whether SLT, teaching or support staff, said that they felt valued and appreciated by their colleagues.  The ethos of "love and care" demonstrated to pupils extends to colleagues.  "It's, I think, inclusive in terms of staff and, of course, we want kids to be respectful but we need to be respectful as well to them, and to each other.  Relationships are everything" (CT).

References were made about the importance of "seeing the 'human' behind the job" and connecting with staff on an emotional level – with numerous examples given.  Support staff felt valued and noted that SLT took an active interest in their life outside of school, for example by asking about their families.  SLT specifically noted the importance of SfLWs as having a key role in pupils' development.

The Framework allowed us to unpick how positive interactions between the adults in the school and the young people was the fulcrum upon which the school operated.

## Conclusion

The Framework for Participation (Florian et al., 2017) allowed a socio-cultural exploration of inclusion and achievement in a Glasgow school – the beliefs, knowledge and actions that underpin these concepts for the whole school community (staff; parent/carers; pupils; third sector partners).  This inevitably raised tensions and contradictions, some of which we have highlighted.  We also discussed situations where the school community felt individualised strategies were necessary, misaligning from inclusive pedagogy.  In this regard, we agree with Florian et al.'s (2017, p. 52) assertion that "the intention of the Framework is not to smooth away the everyday complexities of schools but to provide a means by which they can be more clearly understood".

We believe the Framework offers a method of exploring inclusive pedagogy within a school community, in a way that can complement some existing school reference materials, such as the quality indicators of How Good Is Our School? (Education Scotland, 2015), and the Professional Standards and the National Framework for Inclusion (GTCS, 2022) by capturing the spaces, the relationships, the moments where inclusion and achievement were celebrated.  These everyday, at times quite prosaic, glimmers that are often overlooked in the hectic demands of the school day.  Our research emphasised that inclusive pedagogy does not offer a whole new set of practices – we observed teachers engaging in widely recognised evidence-based practices.  However, the Framework allowed us to explore why, how and when these practices were chosen and provided an investigation of attitudes/beliefs.  Moving forward, the school we worked alongside is going to use the Framework as a self-evaluation tool.  Participants also valued the creation of a reflection space for the school community.  Engaging with teacher belief systems in this way may cultivate a school

climate that promotes inclusion (Wilson et al., 2020), which has implications for school partners such as Psychological Services.

We also sought to explore inclusion and participation from the perspective of pupils themselves – ensuring their voices and viewpoints were key to the data gathered.  This is an identified gap in the existing body of research on inclusive pedagogy (Morina, 2020).

Finally, by exploring the beliefs, knowledge and actions embedded in the culture of this school, set within the broader national context, it is hoped this research will provide a methodology to support practitioners to consider how achievement and inclusion is understood and constructed in their own schools and classrooms – with the aspiration that the "lovely diversity" (Griffiths, 2001, p. 12) of children is expected and valued within learning communities.

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# The Language of Inclusion and its Impact on the Leadership of Equity within Scottish Secondary Schools

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## Abstract

Language and power are inextricably linked, and our use of language influences our attitudes, beliefs and values as human beings. This study focuses on how representations of inclusion frame our collective understanding of the term.  It uses Critical Discourse Analysis to analyse how inclusion is represented in key Scottish policies, media headline representations and through professional association discourse.  These different representations contribute to a variance in understanding and the narrative within education about inclusion.  Empirical research was undertaken with head teachers in a case study local authority to consider how these representations feature within their settings, and examine any impact on the leadership of equity.

Ultimately, language impacts on our attitudes and collective understanding about inclusion. This paper considers how varying attitudes potentially undermine the leadership of equity within secondary schools.

*Keywords:  language of inclusion, power, leadership of equity*

## Introduction

There is international prominence for the development of inclusion as an inherently important feature of education (Ainscow, 2020; Freire, 1970; Macleod, 2014).  In Scotland, inclusion has been influenced and developed within the context of various legislative and national policy drivers, and a discrete education system has been embedded in Scots Law since 1696.  There is a broad definition of *additional support needs* (ASN) in Scotland: support given to children which would be perceived as being different to what is generally provided to young people of the same age (Scottish Parliament, 2004).  In Scotland, the circumstances giving rise to ASN are wide-ranging: examples are on the grounds of disability, health, learning environment, family circumstances and social and emotional needs. In 2023 37% of Scotland's school children were described as having an ASN (Scottish Government, 2023a).

School leadership in the post-pandemic context has changed and, arguably, the importance of social justice has gained moral impetus.  The impact of the pandemic has been substantial: on Scottish society; on the particular contexts in which schools serve; on wellbeing generally (McCluskey et al., 2023).  The imperative to consider how to include all young people has therefore intensified. A

challenge for headteachers is leading equity within increasingly challenging and charged circumstances.

Language around inclusion has developed over this time too, with terms such as *inclusion, equity* and *social justice* being used almost interchangeably.  These terms are used too within the context of policy, research, and influential reports, which collectively shape the development of practice in reality.  Groups who commentate and lobby on educational matters also use these terms, such as the media and professional associations - powerful, influential voices within the field (Brown & Munn, 2008).

Language is used to frame our understanding of the world around us; as humans, we use language to define and articulate beliefs (Fairclough, 2001).  A tenet of the teaching profession is social justice, but there are deep ethical issues when considering the practice of inclusion/ social justice/ equity in Scottish education.  Different voices about inclusion are present in the public consciousness, ranging from the voice of policy, to language in the media and that used by professional associations.  Some of these voices become more amplified than others and are hugely influential to the narrative.

The leadership of equity can be undermined by the representations of inclusion that surround and influence the schools in which we lead (Mowat, 2023).  The variance of voices on inclusion lead to the co-construction of a narrative that is shared, but not impartial.  Instead, it is imbued with emotive language which contributes to polarisation and further inequity.   Yet, as a profession headteachers work towards a 2030 UNESCO goal of ensuring equitable and inclusive education for all which promotes lifelong learning opportunities (UNESCO, 2015).  Both globally and more specifically in Scotland, there is a tension between the enactment of inclusion policy and the pervasive narrative which impacts headteachers.  The way that language shapes our understanding of inclusion is paramount.

## Literature Review

The key purpose of the literature review is to consider what is known about language and power relationships from the field of linguistics, and to consider what is already known about how language of inclusion is represented within educational writing.

### The Sociology of Language

As human beings, we interpret the world through language (Labov, 1971) and humans' attitudes towards topics can be influenced by the specific language used.  Attitudinal differences lead to definitions being co-created, and have the latent potential to be difficult as, if misinterpretations take hold in collective understanding, it can undermine the original intention.  Although it is often assumed that the language of a particular community can for all practical purposes be regarded as invariant across that community (Fairclough, 2001), this is not true for education. Society as a whole has an interest in education due to its reach.  An example of the field of knowledge not being fixed is the significant development in the area of cognitive psychology, adverse childhood experiences (ACES) and trauma (Harris, 2018; Maté, 2011).

Fairclough (2001) positions language as both discourse and social practice.  Where the ideological power stems from in education is complicated, as what is stated in policy is impacted, as this study shows, by other powerful voices which are heard by stakeholders.  Humes (2000) explores the conflictual, class-bound and power-driven nature of language: words have meaning in a social context.  What becomes therefore believed about inclusion has been influenced by the differing voices that have been heard.

**Leadership for Equity**

What characterises Scotland's inclusion policy is its focus on relationships rather than discipline (Macleod, 2014).  However, Ainscow (2020) states that policy is made at all levels of the education system, including crucially the school and classroom levels.  Indeed, through the act of teaching, teachers are the policymakers (Ainscow, 2020).  Teachers' attitudes and beliefs, therefore, are hugely important in advancing inclusion.

Education is a fundamental aspect of society; access to education is recognised internationally as a human right (UN Convention on the Rights of the Child, 1989).  As Ainscow (2020) acknowledges, a culture of inclusion requires a shared set of values, beliefs and assumptions at policy (both national and local) and school level, which can be problematic.

Internationally, social cohesion is regarded as an important global policy agenda item amid debate about multi-culturalism, immigration and national security as well as fears of a lessening of trust in society and agreed values (Brown & Munn, 2008).  However, what is of particular challenge in Scottish education is that the culture for inclusion stretches beyond those involved in day-to-day life at school; it affects all within society.  There are other groups who have powerful and influential voices, such as professional associations and the media.  It is not a prerequisite that these groups necessarily have the same values, beliefs and assumptions as policy-writers, which can lead to a tension in the interpretation of inclusive practice, and offers a challenge to the leadership of equity for school leaders.

**A Moral Imperative**

Leadership of equity is centrally important in Scottish schools.   A sense of urgency to lead for equity is described by Lash and Sanchez (2022).  They acknowledge that the global issues of climate change, racial injustice, the impact of Covid-19 pandemic and economic inequality necessitate such leadership.  Yet there are systemic issues such as frameworks in existence which may limit how social justice functions, or, at worst, enacts and perpetuates disadvantage or incidences of injustice (Brown & Mercieca, 2024).

It is acknowledged internationally that headteachers set the tone for the culture of equity and inclusion (Lash & Sanchez, 2022).  Lash and Sanchez (2022) also refer to a persistent opportunity gap between groups of students, a theme which is echoed in Scottish Government's stated desire to close the poverty-related attainment gap (Scottish Government, 2021).

**What Can Become Lost in this Discourse?**

Much has been written about moral purpose and its close relationship with school leadership (Mowat, 2018; Noddings, 2016).  However, nuance exists in this space as education systems are subject to audit and competition (Chapman & Ainscow, 2021; Kerr & Ainscow, 2022), and such systems further advantage those benefiting from financial and social advantage (Harris et al., 2006).

Ainscow (2020) highlights the importance of the attitudes, beliefs and actions of adults in changing outcomes for vulnerable learners as negative assumptions can exist, based on certain groups of learners' capabilities and behaviours.  Attitude towards inclusion is a key factor in its success or otherwise within a school context (Boyle et al., 2013).

Critical awareness is also based on a vision of a more just future (Lash & Sanchez, 2022).  Discourse in policy must be explored in order to examine its links with social justice.

## Methodology

This research has its origin in the post-structuralist paradigm, and also draws upon a constructivist paradigm.   Meaning is not universal or predictable, but dynamic and context-dependent.   The language of policy writing does not reflect an already-given social reality.   Education means different things to different strata of society, depending on their own positioning with education.  Therefore, the language of policy, which influences the practice of educators and, by extension, the experience of education users and stakeholders, constitutes social reality.

The selected methods for this study involved deconstruction of text, specifically selected policy from Scottish education, to decode intended meaning and application.  It involved analysis of polyvocal, reflexive texts (Hatch, 2023) and has its basis in reflexive research which entails systematic and critical enquiry into others' writings (Bassey, 1999).  It is therefore evaluative research.  Its aim is to advance knowledge through its search for deep meaning through Critical Discourse Analysis (CDA) of the language used in key Scottish education policy.

### Research Questions

This study had three research questions, which are explained below:

1. **How is the language of inclusion represented within current selected Scottish educational policy?**

This research considered three pieces of current Scottish educational policy and one report:

- *Presumption to Provide Education in a Mainstream Setting: Guidance* (Scottish Government, 2019)
- *Included, Engaged and Involved Part 2: Preventing and Managing School Exclusions* (Scottish Government, 2017)
- *National Framework for Inclusion, 3rd edition* (Scottish Universities Inclusion Group, 2023)
- *Behaviour in Scottish Schools* report. The Scottish Centre for Social Research were commissioned by the Scottish Government (2023b)

The research considered texts separately and as a totality.  It examined how inclusion is represented through these individual texts, and also what collective messages about inclusion can be taken.

2. **How is the language of inclusion represented in other sources of media with a wider reach than policy?**

The research examines language about inclusion in the following media contexts:

- Times Educational Supplement (TES)
- The Herald
- The Scotsman
- Daily Record
- BBC Scotland
- Educational Institute of Scotland (EIS)
- National Association of Schoolmasters Union of Women Teachers (NASUWT)

These sources represent a cross-section of voice in the media and have a reach that includes teachers (this is the intended audience of TES) as well as a wider societal reach, which includes both teachers and any stakeholders in education.

3.  **How do the various representations of inclusion impact on headteachers' experience of the leadership of equity within their contexts?**

Through discussion in two focus groups, this research engaged with a range of headteachers in one Scottish local authority to explore how the representations of inclusion impacted on their experience of the leadership of equity within their schools.  In the Findings section, the headteachers are referred to as HT1, HT2 etc.

## Methods and Positionality

The author used Braun and Clarke's (2022) reflexive thematic analysis (RTA) approach to data analysis.  In the post-structuralist paradigm, there is a tacit understanding that the researcher is also part of the world being researched.  As a headteacher who is also a researcher, the researcher is therefore a policy enactor. RTA was selected due to the positionality of the researcher as Braun and Clarke (2022) flip the notion of researcher bias to advocate it as a strength.

This CDA reflects the fact that the context in which policy exists is also important.  Therefore, the methods also included a critical discourse analysis of contextual representation of Scottish education within a selection of printed media, providing a basis to give a comparison.

### Decision to Use Focus Groups

Focus groups were selected as the method, as the nature of the research focus is about language, and a strength of focus groups is the possibility of co-construction of meaning during the discussion (Gibbs, 2012).  The impact on the leadership of equity of different voices around inclusion has not previously captured the voice of Scottish headteachers in research, which was a further justification for this empirical study.

There were two focus groups which in itself was an ethical decision to allow for comparison of content and conclusions to be drawn across more than one group of people (Onwuegbuzie, 2009).  Purposive sampling was used in this research, where a small group of participants was selected to represent the whole (Rai & Thapa, 2015).

The headteachers who made up the focus groups were not homogenous; there were variations with respect to gender, denominational/non-denominational expertise, age, length of service as headteacher, and socio-economic context of the schools that they served.  Although this cross-section was accidental, the researcher found that it was beneficial: the participants represented a cross-section of the population of secondary headteachers within the local authority. Critical case sampling was the sub-type of purposive sampling that was used (Rai & Thapa, 2015) as the breadth of experience of the participants was wide enough to assume that this would be broadly representative of headteachers across the specified local authority, and, in turn, could be extrapolated nationally.

A transcript-based approach was used for recording the data. The discussion was recorded through Microsoft Teams and transcribed on to One Note.  This was due to the volume of information that was shared within the focus group, and the fact that the researcher-as-moderator's recollections would be regarded as an inferior method of analysis (Onwuegbize et al., 2009).

**Analysis Strategy**

To analyse the policy discourse and the media representations of inclusion, the researcher made use of Bacchi's (2009) *What is the problem represented to be?* (WPR) method of inquiry, chosen because it is a mode of enquiry which lends itself to issues of power and social change.

In this research, the research considers through critical discourse analysis how the media and professional association representations define and shape the equity agenda through their vocabulary.

**Findings and Discussion**

**Representations Within Policy Literature and Selected Print Media**

When considering the selected policy documents, a basic analysis of the frequency of key terms (*inclusion/inclusive/include, equity, social justice, relationships, violence, exclusion*) was used to give an indication of the focus, reported in order of frequency in Table 1.

The study of 57 news outlet headlines also showed how frequently particular words or terms were used when referring to additional support needs or inclusion more broadly. The headlines were selected by the researcher searching all headlines of the news sources from January 2023 onwards.

**Table 1**
*Sources and the Incidence of Key Words*

| | Policy Literature | | | | Media | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **Presumption of Mainstream** | **Included, Engaged and Involved** | **Behaviour in Scottish Schools** | **National Framework for Inclusion** | **TES** | **BBC** | **The Herald** | **The Scotsman** | **Daily Record** |
| **Total word count** | 7,247 | 14,635 | 646 | 4,387 | 152 | 47 | 67 | 146 | 158 |
| **Inclusion/ inclusive/ include** | 69 | 51 | 1 | 72 | 0 | 0 | 0 | 0 | 0 |
| **Equity** | 7 | 2 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| **Social Justice** | 0 | 1 | 0 | 4 | 0 | 0 | 0 | 0 | 0 |
| **Relationships** | 9 | 0 | 5 | 4 | 0 | 0 | 0 | 0 | 0 |
| **Violence** | 0 | 1 | 1 | 0 | 5 | 4 | 3 | 5 | 11 |
| **Exclusion** | 3 | 143 | 0 | 2 | 1 | 0 | 0 | 2 | 1 |

The researcher also considered the incidence of the key terms per 100 words of print, summarised in Table 2.

**Table 2**

*Sources with Key Words Analysed to See Incidence Per 100 Words*

| | Policy Literature | | | | Media | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **Presumption of Mainstream** | **Included, Engaged and Involved** | **Behaviour in Scottish Schools** | **National Framework for Inclusion** | **TES** | **BBC** | **The Herald** | **The Scotsman** | **Daily Record** |
| **Total word count** | 7,247 | 14,635 | 646 | 4,387 | 152 | 47 | 67 | 146 | 158 |
| **Inclusion/ inclusive/ include** | 1 | 0.3 | 0.2 | 1.64 | 0 | 0 | 0 | 0 | 0 |
| **Equity** | 0.1 | 0.01 | 0 | 0.02 | 0 | 0 | 0 | 0 | 0 |
| **Social Justice** | 0 | 0 | 0 | 0.09 | 0 | 0 | 0 | 0 | 0 |
| **Relationships** | 0.1 | 0 | 0.8 | 0.09 | 0 | 0 | 0 | 0 | 0 |
| **Violence** | 0 | 0 | 0.2 | 0 | 3.3 | 8.5 | 4.5 | 3.4 | 6.96 |
| **Exclusion** | 0.04 | 1 | 0 | 0.05 | 0.66 | 0 | 0 | 1.37 | 0.64 |

Striking about the headline analysis was the emphasis on violence.  Across the sources, this was grouped with emotive terms: "escalating", a need to "stamp out", "epidemic", "exodus" (of support staff), "crisis", "rising tide", "summit", "no time to lose", "chaos".  The use of figurative language painted the landscape of pupil behaviour as being of a catastrophic nature ("epidemic", "crisis") and on the increase ("rising tide", "no time to lose").  Conversely, there was a distinct absence within the headlines to signpost what schools are doing to address behaviour, or any consideration to the causes of behaviour difficulties.

**Tone**

The emotive language has the cumulative effect of establishing a rhetoric within the written press which is quite different in tone from what is in the selected policy documentation.  While the policies are written for the profession, the press has a wider societal reach.

Professional association websites demonstrate challenge to the policy drivers and the researcher found these to be more aligned with the rhetoric evident in the media headlines.  For example, the EIS's Annual General Meeting Presidential (2024) address spoke of, "violence and aggression a daily occurrence in up to 82% of our workplaces", whereas the NASUWT  website's Pupil Behaviour Position Statement highlights "disruption and violence" within its first sentence (NASUWT, 2024).

**Focus Groups**

The focus group discussions provided a rich source of data about headteacher voice on how the language of inclusion impacts on their leadership of equity.  Following a semantic thematic coding exercise (Braun & Clarke, 2022), the researcher identified the following inter-related themes (Figure 1) as being key to understanding the points of the discussions that resonated most deeply with the school leaders:

**The Power of Voices**

Headteachers talked about the disparity between how they heard behaviour referred to in school, and the contrast with how behaviour was represented in the media. They also talked about the spin that media often add. This had an emotional impact on school leaders, as exemplified by one of the focus group participants: "I became outraged by the line of questioning… not at all atypical" (HT1).

There was consensus between the focus groups that the voices that commentate on education are extremely influential. Headteachers were passionate in their expression of the desire to move forward with educational reform and their belief that this was being hampered by the influence of the media and professional associations in promoting a narrow range of issues. Headteachers were disheartened when this also appeared to influence political decision making:

> The Education Secretary is jumping on the back of some of the things that come out of that because it looks popular. It looks like it's a statistic to use, but actually it's got quite a negative impact on what you're actually trying to do: trying to support young people (HT2)

Headteachers felt the way that information is presented through the media and professional associations shaped conversation as it influenced perception.

Headteachers also spoke about how the language advocated by professional associations appeared to frame how some teachers felt about dealing with behaviour issues: "I hear I'm unsafe, this is unreasonable, I shouldn't have to [be unsafe] at my work" (HT4). Headteachers found this problematic and undermining to the leadership of equity.

**Language: Metaphors and Evolution**

When discussing language, individual perception featured extensively.  What was common was that consideration of language led to an emotional response.  Between both focus groups, there was an acknowledgement that terminology relating to inclusion evolves and it is difficult as a headteacher to always be aware of terminology change.

The metaphor of *fight* divided opinion amongst participants.  One said, "the term fight is an interesting one.  I don't like it in any regard. We're in a caring profession" (HT1) whereas another represented it quite differently: "I'm doing that deliberately to say that we're together, we're a community… People would say, fight for young people. And that would be in the sense of, ensure that they have everything in place to support them." (HT4) This view was echoed by another participant: "We're fighting for the children. We can see what's happening to young people. And it's terrifying, like it's so sad. But you're also fighting for your staff because they're, they're struggling with it" (HT5).

**Societal issues**

Headteachers discussed how schools had changed during their time as leaders.  They spoke of the enhanced development in the diagnosis of neurodivergent conditions, including an ever-evolving use of language that they felt pressured to keep up with.

There was considerable passion exhibited when the discussion turned to how young people fit into society: "You can't fix what society's creating, which is distressed, challenged, impoverished young people." (HT4).

Lobby groups were also presented as being influential to the context of schools.  Headteachers spoke about their role in trying to ensure equity between marginalised groups, which could be challenging, particularly concerning "politically loaded" issues such as "global flashpoints": specific examples given were the Gaza conflict, the Black Lives Matter movement, and complexities surrounding the expression of views on LGBT issues.

**Impact on the Leadership of Equity**

There was consensus between both focus groups that the presentation of inclusion through language undermines the headteachers' leadership of equity within their schools.  Stelmach, Smith and O'Connor (2021) write about the tension that can exist between one's inner convictions and external expectations, leading to "moral distress".  This was evident in various strands of the focus group discussion, most notably in terms of how time is spent and, by extension, how it is not being spent.

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**Discussion**

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In this study, themes about how language affects understanding came through strongly from both the literature and the empirical data gathered from the headteachers.  The field of education is complex and dynamic.  This complexity leads to differing interpretations.  Policy should provide the frame of reference for teachers.  However, in reality, the combination of policy with other powerful voices – those of the media, professional associations, society – gives rise to alternative viewpoints from those articulated in policy, leading to a conflict between policy and practice.

From this research, the key conflicts impacting on education leadership for headteachers are as follows (Figure 2):

**Figure 2**
*Key Conflicts Impacting on Leadership for Equity*
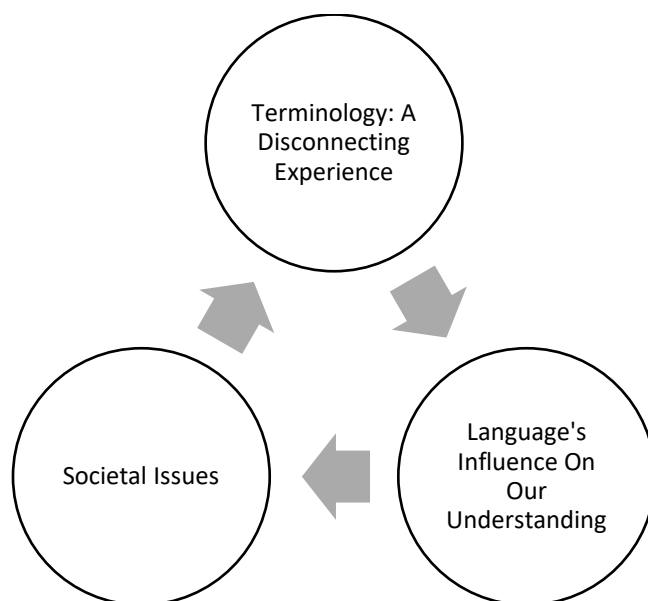


## Terminology: A Disconnecting Experience

The findings suggest that specific terminology is crucial to a consensus in understanding. The term *inclusion* is central to Scottish education, and *social justice* is the first professional value detailed within the General Teaching Council for Scotland's Standards (GTCS, 2021).

The implication is an unsettling influence on the teaching community where behaviour has been re-framed in the mainstream media using disaster metaphors ("crisis", "epidemic"). Headteachers find that this language undermines the leadership of equity as it changes the focus from what is expected in a school community to something which is much more divisive and polarised. There is interplay here between terminology and societal issues, as the current social and economic context is putting pressure on those most disadvantaged in society, which has consequences for inclusion in schools.

## Language Influences the Way We Understand

What was of more importance to the headteachers who contributed to this research was that the changing language is undermining the leadership of equity as the way in which issues are being presented appears to be changing attitudes towards the situation – this is particularly true about behaviour. The findings suggest that headteachers are uncomfortable about this as they feel it is leading to a situation where young people can be vilified through the depictions of them, and that power dynamics can become blurred.

## Recommendation 1: Teachers who understand and respond to additional support needs

There is a gap between the language of policy and the practice of the profession. In the space between policy and practice, there is dialogue and the influence of media sources, professional associations and stakeholders in education. It is recognised that ASN are more represented within

the more deprived SIMD deciles[1] and that the ASN categorisation in Scotland includes behaviour (Scottish Government, 2004).  Issues impacting on poverty are increasingly prevalent in society: the impact of Covid-19, economic instability, substance misuse, climate catastrophe, social unrest.  The headteachers anticipate ASN to grow.  An increase in ASN likely to make our schools and classrooms more diverse and challenging; teachers are needed who understand and are responsive to such diversity and challenge.  A critical consciousness of the language of inclusion and the latent inequalities that go with mis-representations of the policies and practice of inclusion, is imperative.

**Implications on Leadership for Equity**

The literature suggests that there is a need for an increased understanding of contextual variables that impact on our students' daily lives and opportunities to learn (Lash & Sanchez, 2022).  This is supported by the empirical data gathered from headteachers who talked about many contextual factors, including some which are particular to the post-Covid landscape and point towards increased challenges which are likely to come in the long term regarding early literacy and child development.

**Societal Issues**

The findings suggest that headteachers' leadership of equity is impacted considerably by societal issues which are outwith the control of individual schools.  Headteachers in both focus groups spoke about global conflict and the leadership struggles that they have in trying to manage the political sensitivities at school level.

**Recommendation 2: The need for local authority guidance**

There was considerable difference in how headteachers viewed their school's place in giving voice to issues of global sensitivity.  When situations are sensitive and impact on whole communities, the provision of guidance from the local authority to support headteachers' response would be a supportive action to avoid the variance that the findings of this research suggest are arising.

Furthermore, the different representations of inclusion lead to issues for headteachers in leading equity within their schools.  These issues include the concept of othering, of ignoring the life histories and experiences of marginalised groups, the perpetuating of oppressive systems, and social and school exclusion. Inclusion is a noun, a state of being.  It is our responsibility as educators to include, yet there are many contested situations about whether it is always possible, truly desirable, in everyone's best interests, and fair. A steer from the local authority would cut through the variance of individualised interpretations.

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**Conclusion**

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This study had three research questions at its heart and conclusions about each have been drawn:

1. How is the language of inclusion represented within current selected Scottish educational policy?

In the policy included within this study, there was a tone of optimism.  Ministerial forewords added weight to the policies, defining education within the vision for a just society (Scottish Government, 2017, p. 1).  WPR analysis found a strong thread of social justice, with a focus on relational practice and positive school ethos.

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[1] The Scottish Index of Multiple Deprivation (SIMD) (Scottish Government, 2020) is a tool to identify areas of concentrated deprivation

2.  How is the language of inclusion represented in other sources of media with a wider reach than policy?

In contrast, analysis of media headlines had a different focus. Behaviour was the most-often highlighted ASN, frequently framed as "violent", and contributing to a cumulative picture of schools being painted as chaotic environments.

The Scottish Government updated guidance on behaviour has recently been published (Scottish Government, 2024). Although full analysis of the new guidance has been beyond the scope of this study, initial reading suggests that its emphasis is more on violence than previous iterations have been, signalling a change in direction for Scottish Government framing of inclusive practice.

3.  How do the various representations of inclusion impact on headteachers' experience of the leadership of equity within their contexts?

Headteachers spoke with passion about leading equity. There was a shared understanding acknowledged that the teaching profession is deeply committed to inclusion. There was a prevailing view noted that there is a discord between the intent of policy and day-to-day practice in schools.

There was also a feeling of dismay amongst headteachers about how behaviour is represented. The latent power of some of the voices, particularly those of professional associations and the media, was acknowledged.

**Implications and Summary Recommendations**

1.  It is important that headteachers are supported by their local authorities to lead with confidence, and this should include being given guidance on global issues with political sensitivities.
2.  A recommendation is for the theme of the influence of language on attitudes to be included in programmes designed to support development of aspirant and new headteachers. This will support their developing critical consciousness as they lead school communities in challenging times.
3.  A strong understanding of ASN and the implications of these is imperative for a workforce which is capable of responding to the needs of such diversity and challenge. Consideration of the language of inclusion and the latent inequalities that can go with mis-representations of this language, is imperative.

The interplay between language, attitude and human behaviour is fundamental to how society understands and operates. As educators in Scotland, we have a stated commitment to social justice. For this to be truly embodied, how we as a society use language about inclusion is paramount.

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Ruth McConachie is Headteacher at Whitehill Secondary School in Glasgow.  Ruth was raised and educated in the Highlands of Scotland, relocating to Glasgow to go to university and begin her teaching career.  Initially an English teacher in North Lanarkshire Council, Ruth then moved into the area of Pupil Support, taking on leadership roles in North Lanarkshire and then Glasgow City Council.  Ruth is deeply interested in equity, inclusion and curriculum transformation.  She completed her MEd in Education Leadership through the University of Glasgow's School of Education in 2024.

# Excellence and Equity for All? An Investigation into the Contributing Factors to Early School Leaving and Youth Unemployment, Contextualised via Scotland's School Leavers' Outcomes

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## Abstract

This paper explores the contributing factors associated with secondary-school-aged young people leaving school before or immediately after they reach the end of compulsory schooling. The paper also considers the relationship between leaving school at this point and transitioning to unemployment, identifying key overlapping thematic concerns. Additionally, the paper considers the impact of education policies designed to mitigate some of these risk factors and ensure equitable experiences and outcomes for learners in Scotland. Whilst there have been changes in post-school transition outcomes for Scottish school leavers during the identified policy lifespan (2009-2023), this paper points to a continued correlation between leaving school early and poorer overall outcomes for those young people in Scotland.

*Keywords:* early school leaving, Not in Education, Employment or Training (NEET), school leaver outcomes, youth unemployment

## Introduction

The overarching aim of the research conducted here is to better understand the variables, as identified in literature, which contribute to early school leaving: young people leaving school as soon as it is no longer compulsory (Gonzalez-Rodriguez et al., 2019), and to explore the relationship between leaving school early and progressing to a non-participatory (Not in Education, Employment or Training – "NEET") post-school pathway (Macedo et al., 2020).

The Organisation for Economic Cooperation and Development (OECD) have recognised a correlation between early school leaving and NEET (OECD, 2022a). There is also a suggested correlation between early school leaving and negative individual and societal consequences, such as poverty, poor physical and mental health, low self-esteem, low skilled workforce, and lower productivity (Brown, Olmos Rueda et al., 2021). Consequently, the OECD have placed emphasis on the importance of national policy mitigations to stem the flow of young people into NEET destinations (OECD, 2022a). Cognisant of this, and as a researcher-practitioner in Scotland, I have sought to consider some of the implications and impact of these identified risk factors and associated policy measures in a Scottish context.

There is no single agreed definition of NEET across the devolved countries of the UK (Maguire, 2015), with, for example, the distinction being between "positive destinations" and "other destinations" in a Scottish context (Scottish Government, 2023g). However, using the OECD's measure (OECD, 2024), across the UK overall, the percentage of young people who were categorised as NEET in 2023 was 13.7%. In the last few years, the OECD average has improved from 16.1% in 2021 to 13.8% in 2023 (OECD, 2024), whereas the UK position has worsened from 13.4% to 13.7% across the same period. The UK sits 19th overall on this measure across the thirty-four OECD countries listed, well ahead of countries such as Turkey (31.1%) and ahead of Italy (18.7%) but behind countries such as Germany (9.6%) and Iceland (4.7%) (OECD, 2024).

**Scottish Educational Context**

In Scotland, school ceases to be compulsory at the age of sixteen. This means young people reach school leaving age at either of the end of their fourth year of secondary (S4) or mid-way through their fifth year (S5), as they reach or approach the age of sixteen. This paper focuses on those young people who choose to leave as soon as they are no longer legally required to attend school.

*Curriculum for Excellence* (Scottish Government, 2004, 2008) sets out clear "entitlements" for young people in Scotland, and the Scottish Government pledges to ensure "Excellence and Equity for All" (Scottish Government, 2016) communicating clear expectations around the importance of motivating and engaging learners and on meeting the needs of all young people, and particularly those who may require more opportunities to engage. In recognition of the risks associated with leaving school and transitioning to NEET and at a time of high unemployment across Europe (Scottish Government, 2014a), the Scottish Government instructed a review of Scotland's response to youth unemployment, with a specific focus on how young people transitioned out of school (Scottish Government, 2014a). The subsequent report *Education Working for All* (Scottish Government, 2014a) highlighted data in the preceding five years showing that one in five young people aged 16-19 were not in education, employment, or training (Scottish Government, 2014). This report identified, among other factors, that young people who left school early often reported low levels of school belonging and they did not see that school had a purpose for them; they did not feel motivated or engaged and so chose to leave school as soon as possible. There was, in the context of this 2014 report, an apparent tension here between the policy aspirations of *Curriculum for Excellence* in ensuring the needs of all young people are satisfied, and the lived reality as experienced for a sizeable cohort of young people.

The main policy response to high levels of youth unemployment in Scotland, *Developing the Young Workforce: Scotland's Youth Employment Strategy* was a seven-year plan launched in 2014 with the specific goal of reducing Scotland's youth unemployment rates by 40% in the period up to 2021 (Scottish Government, 2014b). The impact of this response will be considered later in this paper. However, whilst there has been an increase overall in the number of young people attaining positive destinations post-school in the period since the policy inception, for example with 95.87% of all school leavers in Scotland attaining a positive destination in 2022-2023, with an average of 95.1% in the period 2019/20-2022/23 (Scottish Government, 2024) - for S6 leavers, this number was 97.75% in session 2022/23 with an average of 97.15% across the period 2019/20-2022/23 - the number remains lower for those leavers who leave school as soon as they have completed compulsory education at the end of S4, with 92.71% of the 7890 S4 leavers transitioning to a positive destination in 2022/23, averaging out at 90.9% across the same four-year period (Scottish Government, 2024). This means that on average, somewhere between 500-800 young people left school at the end of S4 each year across this period and did not progress to a positive destination. Of those who reside in the most deprived backgrounds, the average percentage of S4 leavers transitioning positively is 88.65% across this period (Scottish Government, 2024). It is worth considering the practical

implications of this in the context of increasing numbers (in recent years) of young people in Scotland leaving school in S4, as conveyed in Figure 1 below:

**Figure 1**
*Percentage of Secondary School Leavers by Stage of Leaving, 2009-10 to 2022-23 (Scottish Government, 2024)*
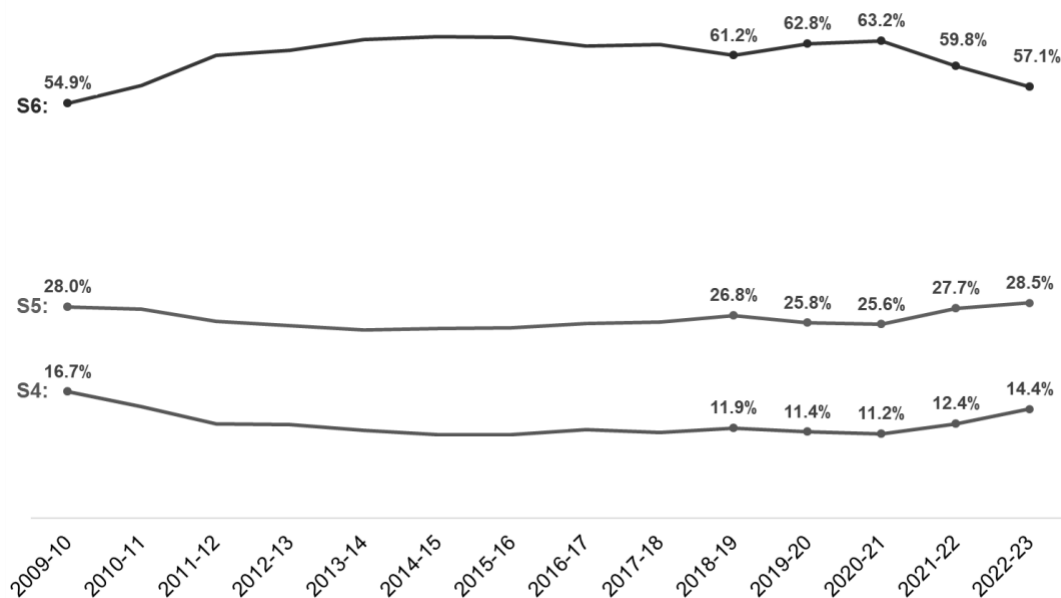


The data points to an increase in the number of S4 leavers in the last five years. Where positive post-school outcomes are less likely for these leavers than for those who remain in school beyond the age of compulsory school education, there are implications for the education system in Scotland: schools and local authorities, further education providers, training providers, employers, and support agencies. Better understanding of the reasons why young people leave when they do will enhance the system's capacity to mitigate the risks through evidence-informed policy and practice.

**Scottish Education Policy**

I engaged in a critical policy analysis (Young & Diem, 2018) of key policy areas in the context of Scottish education to better understand how risk factors to early leaving and non-positive transitions were mitigated against in a Scottish context. The "critical practices" posited by Young and Diem, (2018) support the interrogation of policy and specifically support questions around the relationship between policy rhetoric and lived reality. Given my position as a headteacher in Scottish education, living much of the policy reality and impact, this was a useful approach. The identified policies are relevant to Scotland's stated ambitions around achieving Excellence and Equity for All, (Scottish Government, 2016, 2023e), Scotland's specific policy strategy designed to tackle youth unemployment, (Scottish Government, 2014b), and the stated entitlements young people have within Scottish education (Scottish Government, 2004, 2008).

The three policies referred to above point to high aspirations from the Scottish Government around the issues of equity and excellence for all young people:

- *The National Improvement Framework* (Scottish Government, 2016, 2023e) outlines key priorities at national level, and the commitment to annually review based on targeted data collection supports the Scottish Government to monitor progress relative to these targets.

- *Curriculum for Excellence* (Scottish Government, 2004, 2008) sets the national expectations around curricular provision including a series of entitlements which all young people should expect to experience and enjoy. Within this framework, there is ambition around flexible and context-based planning which is designed to ensure that all young people can build their capacities and develop the skills and attributes required for their future and the future of Scottish society.

- *The Developing Scotland's Young Workforce* strategy (Scottish Government, 2014b) sets out the Scottish Government's expectations of what schools, colleges and other partners will do to support young people to be more work-ready and ultimately progress to a positive sustained destination.

In all three cases, whilst there have been successes relative to targeted areas and/or identified through review; it remains the case that there is a disconnect between the policy rhetoric and the lived reality of stakeholders: young people are still leaving school early and still attaining a non-positive destination. Within some cohorts this picture is improving, and this is validated by the data outlined above. In others, and worryingly, this applies to the most vulnerable and at-risk groups, the lived experience is quite different to what the policy documents espouse.

## Review of Literature and Thematic Analysis

Increasingly, literature reviews are being utilised as a research methodology to support and inform in policy and practice development (Cohen et al., 2018). The objective in this case was to better understand what is known about this area (Gough et al., 2017), to acquire a greater knowledge of the phenomena identified (Cohen et al., 2018), and to consider these in my own context of Scotland, identifying where further or more specific research may be beneficial. To this end, my next step was to search for relevant literature (Cohen et al., 2018), by developing a search strategy (Gough et al., 2017) and through an iterative process, develop inclusion criteria and a method of screening the resulting findings (Gough et al., 2017). Using the identified literature, I employed Thematic Analysis (Braun & Clarke, 2006) to acquire and understand "patterns of meaning" from the substantial body of research in this area (Clarke & Braun, 2017, p. 297). Thematic links across the literature were identified and collated into a thematic map. From this, I was able to categorise consistently present risk factors which pertained to both early leaving and NEET: factors related to the individual; issues linked to families; relationships with peers, teachers and support staff; issues around school systems and structures; and expectations and factors pertaining to wider society.

## Key Findings

There is consensus across the identified literature that both early leaving and NEET are areas which impact in a significant way on individuals and society (Brown, Olmos Rueda et al., 2021; Gonzalez-Rodriguez et al., 2019; Macedo et al., 2020). There is also agreement that risk factors associated with each are multidimensional and multifactorial in nature. The key findings of the literature review are summarised and discussed below.

### Personal Challenges

The main findings across the literature in this area pointed to young people who left school early conveying low self-esteem, low self-confidence, low motivation to learn, and feelings of isolation or exclusion from school (Brown, Olmos Rueda et al., 2021; Gonzalez-Rodriguez et al., 2019; Lőrinc et al., 2020; Maguire, 2015; Olomos Rueda & Sallan, 2021; Pendergast et al., 2018; Pesquera Alonso et

al., 2022; Van Den Berghe et al., 2022). Linked to these feelings, the referenced research pointed to young people with low levels of academic attainment, experiences of academic failure, low levels of educational performance, negative self-perceptions around academic achievement and low expectations around what could be achieved in education (Brown, Olmos Rueda et al., 2021; Gonzalez-Rodriguez et al., 2019; Lőrinc et al., 2020; Maguire, 2015; Olomos Rueda and Sallan, 2021; Pendergast et al., 2018; Pesquera Alonso et al., 2022; Van Den Berghe et al., 2022).

Pendergast's (2018) study revealed that it was in middle school (ages 12-15) where the feelings of low school belonging became more prominent, suggesting that there is potentially a disconnect between how young people experience the early/primary school years and their lived experience of the secondary education. In addition, in a Scottish context, the OECD (2015) point to an apparent disconnect between the vision of Curriculum for Excellence and the lived experience of young people when they transitioned from the Broad General Education (S1-S3) to the Senior Phase (S4-S6) suggesting that the assessment and examination system was inconsistent with this vision and also pointing to this having implications on the Broad General Education as this was more and more being used as a runway for the Senior Phase. Personal challenges are prevalent across the referenced literature, largely around how young people see themselves, how they think they fit into school and education and how equipped they feel in readiness to meet the challenges consistent with progression to adulthood. These feelings are contributing to young people's decision-making around leaving school.

**Family Circumstances**

Risk factors in this category were found to relate to two primary areas: socioeconomic status of families and parental experiences and attitudes towards education. In summary, there was a correlation between lower socioeconomic status, less positive parental experiences of education (including academic levels of parents) and higher levels of early school leaving and NEET (Gonzalez-Rodriguez et al., 2019; Noh & Lee, 2017; Olmos Rueda & Sallan, 2021; Pendergast et al., 2018; Van Der Berghe et al., 2022). As indicated earlier, there is a lack of qualitative research in a Scottish context into early school leaving and NEET; however, the Scottish Government (2024) provide data annually on leavers cohorts, shown in Figure 2.

**Figure 2**
*Percentage of Mainstream Secondary School Leavers in a Positive Initial Destination by SIMD quintile, 2009/10 to 2022/23 (Scottish Government, 2024)*
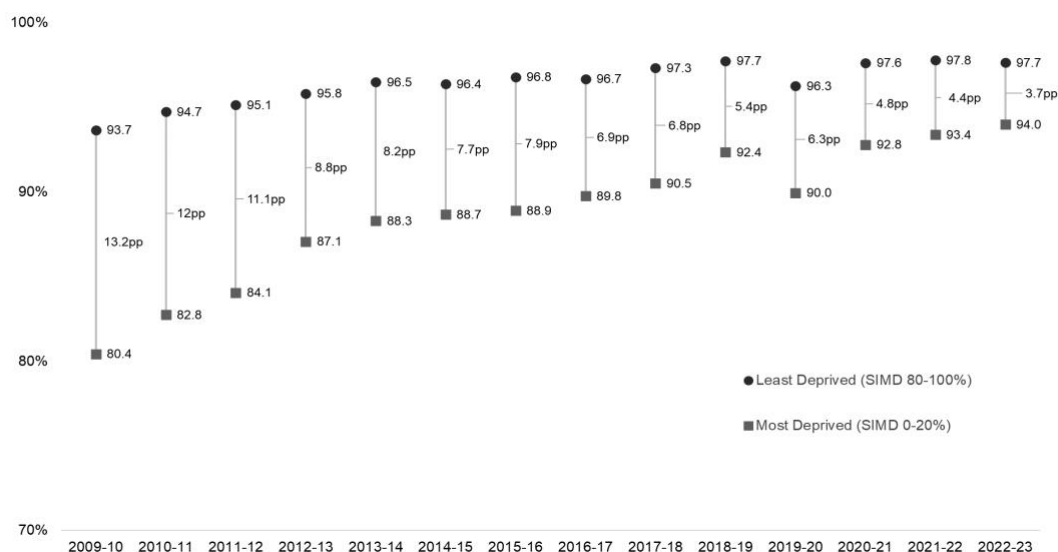
Each year since 2009-10, a lower percentage of those who are the most deprived 20%, have progressed to positive destinations, relative to the 20% least deprived. Whilst at whole cohort level, there have been improvements and this particular gap is closing, there is still a clear link in Scotland between family circumstances and a non-positive destination. Specific data about the early leavers (S4) cohort in relation to socioeconomic status would be useful but single cohort data on this metric is not available via the Scottish Government's data set. It is likely, given the patterns emerging from the other data cited, that this gap would be wider.

The Scottish Government, for example, through the Scottish Attainment Challenge (2015), have provided additional targeted funding, Pupil Equity Funding (Scottish Government, 2023g), to support various interventions to mitigate family circumstances. This funding is based on the socioeconomic status of families: their qualification for free school meals. As is clear from the literature, however, there is no single root cause of early school leaving or those in NEET; there is an interconnection between multiple factors. This is a macro and meso level policy challenge (Priestley et al, 2021), given the Scottish Government's priorities and their filtration through the system, but it is also a challenge at micro level (Priestley et al., 2021): it is very difficult to meaningfully mitigate the impact of family circumstances on early leaving and non-participation when the impact is so wide and interconnected.

**Social Relationships**

The key findings identified in this area of risk factor were around young people's experiences and interpretations of peer and adult relationships. Young people were more likely to disengage and/or leave school early where they did not have positive peer relationships or did not feel that they had a teacher or adult in the educational setting with whom they could connect (Brown, Olmos Rueda et al., 2021; Pendergast et al., 2018; Schmitsek, 2022). Peer relationships were deemed highly significant (Brown, Olmos Rueda et al., 2021) where the peer group's attitude was anti-school; this was more prevalent in young people from lower socioeconomic backgrounds, again highlighting the interconnection between risk factors. Young people felt more invested in school when they had a fulfilling social connection, where they felt they belonged and they mattered (Pendergast et al., 2018). Young people's identification of a key adult with whom they have a positive, supportive relationship is important and could support and add purpose to early warning systems in a school setting, for example. Additionally, in a Scottish context, it is an entitlement for all young people to have *personal support* to maximise opportunities across the curriculum (Scottish Government, 2008); further focused research on the experiences of this provision in the context of Scottish young people who have left school early or progressed to NEET, would add useful knowledge to this area for practitioners and inform intervention where required.

The young people in this research (Pendergast et al., 2018) consistently pointed to the importance of seeking a sense of personal identity among peers. Where the influences around this transition were not positive, there was a higher risk of disengagement. Again, the literature points to a correlation between a higher risk of negative influences for those with lower socioeconomic status. Much of the research here was conducted with young people who had already disengaged and/or who were either NEET or had recently re-engaged. This both supports and limits the findings, in my view: in the first instance, this research (Pendergast et al., 2018) is directly involving young people impacted by these risk factors; they can recognise and articulate their lived experience of this reality. Conversely, for those who had recently re-engaged, their perception of previous reality could be biased by the positive experiences they enjoy via re-engagement.

**Institutional Features**

The main findings in this area pointed to risks associated with school culture and environment, school policies, a perception that school systems were too rigid and inflexible, a lack of appropriate pathways and teaching methodologies which were not deemed to meet the needs of all; there were areas of overlap again with other identified factors (Brown, Díaz-Vicario, 2021; Macedo et al., 2020; Pendergast et al., 2018; Schmitsek, 2022; Van Der Berghe et al., 2022). Young people across this research, highlighted that they found the expectations of schooling to be a source of tension. They did not like the rigid timetabling; the requirement to sit behind a desk and to use textbooks; the lack of flexibility in terms of what they studied and how they studied; they felt that the language used by teachers towards them was too authoritative; they cited a lack of appropriate progression pathways and issues with the need to sit traditional examinations; they felt that their educational experience lacked relevance.

Whilst again, there is a lack of qualitative data to contextualise this in a Scottish context and this would be useful to build awareness and capacity in the system around the perceptions of institutional features amongst school-aged young people in Scotland; there are elements of the findings here which I can recognise as a school leader in Scotland. In this context, the institutional risks of early leaving and NEET are, it could be argued, mitigated against through some of the structural factors implemented in Scotland. For example, the ideals behind Curriculum for Excellence were designed to allow practitioners flexibility in terms of curriculum planning and delivery; the rhetoric points to there being less need for inflexible and rigid approaches. Young people are *entitled* to exercise agency through *personalisation* as they progress through the curriculum, they should get more say in what they learn and study; there is a focus, as one of the "Principles of Curriculum Design", to ensure that learning is *relevant*, so young people can recognise the purpose of their learning (Scottish Government, 2004, 2008). Moreover, Developing Scotland's Young Workforce (Scottish Government, 2014b) places demands on Scottish schools to ensure that there is greater awareness and access to a wide range of pathways through and post-school, again contributing to flexibility and choice for young people and mitigating some of these risks. Indeed, there has been an increase in the number of SCQF 6 level vocational qualifications undertaken by young people in Scotland in recent years, peaking in session 2022-23 (Scottish Government, 2024).

Whilst it has already been shown that for the most part, levels of successful transition from school have improved across Scotland for the *all school leavers cohort*; the number of successful transitions for early (S4) leavers, has remained lower (Scottish Government, 2024). Moreover, the percentage of S4 leavers in Scotland has increased from 11.1% in 2014/15 to 14.4% in 2022/23 (Scottish Government, 2024); one interpretation of this increase, substantiated via the consistency of non-positive destination figures across this period for the S4 leavers cohort, is that the measures implemented are not effectively mitigating early leaving or transition to NEET for all young people.

**Structural Factors**

There is overlap in this area across the other categories of risk factor. The research identified a high prevalence of issues associated with perceptions around education policy, particularly around performativity measures (Brown, Díaz-Vicario, et al., 2021; Olmos Rueda & Sallan, 2021; Pendergast et al., 2018) and a lack of non-academic pathways (Macedo et al., 2020; Noh and Lee, 2017). Across the research cited above, patterns were cited around participants' views that for many of them, not fitting the mould and following a traditional academic pathway resulted in marginalisation and disengagement. They reported feelings that they mattered less in school than their more traditionally academic peers, that their teachers did not focus as much on them and had lower expectations. This could resonate with many of the other categories of risk factor identified earlier with low self-esteem, a lack of self-confidence and a negative academic self-image fuelled in a

context perceived in this way. This is arguably a strong example of where activity and expectations at the macro/meso levels has implications at micro and nano level (Priestley et al., 2021): local authorities enact national government attainment policies (macro > meso) and school leaders, driven by a performativity agenda from their local authority, (meso > micro), create or oversee cultures of accountability and performance measurement. The result is that teachers focus on only what is measured, and pupils only feel that they matter if what they do is measurable (nano) (Priestley et al., 2021).

In the Scottish system and in my experience, the measures with most social capital, i.e. those which are valued most by local authorities, further and higher education establishments and by employers, have traditionally been National Qualifications at levels five and six, assessed and certificated via traditional examinations. Pathways that do not sit within this system, do not have parity (Scottish Government, 2022). Post-Covid-19, the Scottish Government ordered a review into the Scottish system (Scottish Government, 2022, 2023a, 2023c; OECD, 2022b). The recommendations arising out of the review process point to a rethinking of the rigid, inflexible, high-stakes examination system experienced by so many. These recommendations followed prior reviews of the Scottish curriculum (OECD, 2015, 2021) with the latter directly referring to the need to reconceptualise the Senior Phase of Scottish education, aligning it more closely with the Broad General Education. In practice, this *should* mean that the Senior Phase experienced by young people in Scotland in years to come, more closely correlates to the ideals of Curriculum for Excellence. In the context of early school leaving and transition to NEET, this *should* mean that there is a much wider range of pathways with parity of capital, mitigating the sense of marginalisation and subsequent disengagement reported because of structural features. Further research into the lived experiences of young people should be undertaken once this new system is embedded, and quantitative analysis of the impact this has on leavers cohorts in terms of destinations and highest level of qualification attained will support further intervention and support at cohort level.

## Conclusion

It is clear from the literature that there is no single causal effect of early school leaving and NEET transition, however, both early leaving and NEET share a number of characteristics and there is a clear, though not inevitable, relationship between the two. The research points to an interconnectedness between risk factors, with personal challenges and family circumstances, especially socioeconomic status, mediating the others. Where young people lack self-esteem, and self-confidence, where they feel that school is not necessarily a place for them due to perceptions around their ability to learn and to achieve, there is an increased probability that they will leave school as soon as possible. Young people from lower socioeconomic backgrounds are more likely than their more affluent counterparts to leave school early and, where there is a lack of positive peer and/or adult relationships or where there are anti-school views at home or within peer groups – either due to negative experiences of school or a lack of importance placed on school-based education – young people are more likely to leave school early. Where young people find the structure and expectations of the school day: the building, the timetable, the setup in learning environments, the teacher-pupil relationship, difficult to adhere to, they are more likely to leave school early. Personal and family circumstances exacerbate the latter. Finally, where young people feel that they do not fit with a performativity agenda, meaning they do not feel that they can or wish to contribute to the high-performance requirements of school education, namely exam success, they are more likely to leave school early.

The lack of available research in the Scottish education context limits my ability to make concrete connections between identified risk factors across the literature and the specifics of the lived experience of young people in Scotland, beyond the correlation between leaving age and post-school

destination. Despite the policy rhetoric (Scottish Government, 2016), however, there remains a sizeable minority of young people for whom the lived experience does not correlate with the espoused vision. Scottish education is in a period of flux and with this comes opportunities to address some of the issues in the system (Scottish Government, 2022, 2023a, 2023c). A system, more cognisant of and better equipped to mitigate the risk factors associated with early school leaving and transition to a negative post-school destination, could contribute far more effectively to the vision of excellence and equity for all.

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# Professional Reviews (PRDs) in Early Year Settings in Scotland: A Critical Exploration of the PRD Process and Potential

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## Abstract

This research study principally aims to investigate the process and potential of professional reviews (PRDs)[1] in early years settings.  This topic was an area of interest to me as a researcher, because I have been working for over 20 years in childhood practice and only received two PRDs in that time. Early years is evolving, and policy and guidance is everchanging. Siraj and Kingston (2015, p. 15) highlight it is therefore essential that practitioners maintain commitment to professional learning to effectively deliver the provision the service expects, leading to improved outcomes for children.

Staff within an early years setting were key research participants. The investigation was positioned in the interpretivist paradigm, as it explored early years practitioners' (EYP) experiences and perceptions.  This study will interrogate whether staff require a PRD for professional learning to happen, thus exploring PRDs' purpose. The study will also compare continuous professional development requirements, within the Glasgow context specifically, in early years, and that of the teaching profession (primary and secondary sectors).

The data collected indicated that the potential of PRDs was dependent on how the process was carried out. Themes emerged highlighting that leadership was perceived to be a main factor to the success or failure of the PRD process, and how staff professional development could ultimately impact on provision and outcomes. The implications of this research could ignite change and highlight the absence of current literature in this field of study.

*Keywords:*  early years practitioners (EYP), Early Learning and Childcare (ELC), professional review and development (PRD), professional learning

## Introduction

This article is written in the first person because as the researcher I had an active role in the study. Braun and Clarke (2013, p. 305) explain that writing in qualitative research often involves putting yourself into the text and reflecting on your own role within the research.

In this research I used my own setting as a case study to explore staff PRDs. This is a particular area of interest to me as, although there are policies, guidance and literature that underpin practice

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[1] Professional Review and Development (PRD) is an ongoing learning process supported by an annual meeting between reviewer and reviewee. For pragmatism, this paper also refers to the annual meeting as a PRD.

relating to the importance of and participation in PRDs, they refer mainly to engagement in continuous professional learning (CPL). In guidance aimed at the Early Learning and Childcare sector (ELC), CPL is an essential component of ELC quality (Education Scotland, 2020). Scottish Government (2023) would like a well-trained, professional and skilled workforce with access to high quality professional learning. To achieve this, the Scottish Government has invested in a workforce development programme (Scottish Government, 2023) which will ensure all staff are aware of best practice and are supported in their workplace.

One of my duties as head of nursery (HON), is to ensure staff PRDs are delivered. While there are variations in structures and practice, the common principle of the PRD is to advance the skillset for practitioners/leaders by providing the opportunity to meet annually with senior management, to identify areas for development and growth, and to highlight strengths in their practice.  In their workforce review Siraj and Kingston (2015, p. 60) emphasise the importance of staff gaining experience and being highly qualified to ensure outcomes are positive and equitable for all children. This is expected to support the Scottish Government's (2022, p.71) ambition for Scotland to be the "best place in the world to grow up". Significantly, to progress professionally, practitioners should reflect on this policy intention and engage in continuous learning (Scottish Government, 2023).

This study will examine the potential effect and influence of leadership on PRDs. McDowall-Clark and Murray (2012) indicate that leadership does not rest on positions of authority, noting that all practitioners can inspire change, regardless of their formal leadership status. This research aims not only to inform practice in my setting, but also offers insights and deeper understanding of the influence the leader and leadership approach has on PRDs. In addition to developing one's own knowledge, practice and growth, Ragland (2006) highlights that developing practice through professional enquiry results in extending and deepening professional practice, creating local knowledge (Mockler, 2013). Thus, this study will potentially extend knowledge to sites of practice beyond the case study centre as there is potential for others to learn from this exploration.

### Literature Review

Prior to conducting any project, it is important to develop a robust understanding of any previous research done in the same or similar field and to develop a secure knowledge of current literature pertaining to the subject matter (Saunders & Rojon, 2011). While conducting this research, I noted an absence of current literature within the Scottish context to strengthen the rationale for this study.

### ELC Policy Within the Scottish context

There has always been a strong focus on developing the ELC workforce, especially in the past four years with the recent increase in entitlement, rising from 600 hours to 1140 hours. This has resulted in ongoing review and development of legislation, policy and ELC guidance, focusing on professionalism and leadership (Education Scotland, 2012, 2016, 2018, 2020; Siraj & Kingston, 2015; Scottish Social Services Council, 2015; Wingrave & McMahon, 2016).

Research indicates that excellent investment in ELC can mitigate against potential social and economic disadvantage (Heckman & Mastertov, 2007; Siraj & Kingston, 2015). The ambition is to close the attainment gap, with a skilled workforce positively impacting children's attainment and future life chances (Bradshaw et al., 2015; Dunlop, 2015). My research indicates that the process of meeting annually with a leader, using processes like PRDs to discuss professional development, as suggested by Scottish Government (2016), would benefit workforce development.

Nationally, ELC settings are inspected by HMIE against Education Scotland's *How good is our early learning and childcare*? (HGIOELC) (2016). This document provides an important contribution to

support those working in the ELC sector and supports the setting's capacity for improvement. Quality indicator 1.4 (Education Scotland, 2016, p.19) states that highly effective practice in early years would see "all practitioners undertake reviews, at least annually, to help to improve and develop practice". This concurs with Glasgow City Council (GCC) (2016), as staff are expected to evaluate their own professional development (PD) needs and engage in CPD to ensure they have the right skills to meet all children and young people's needs.

**Professional Review and Development (PRD)**

In relation to documents already discussed, according to Scott's (2003) contextual framework the process of PRDs is not mandatory and is non-descriptive. Some leaders may choose a differing method to the PRD, to achieve an equally good standard.  Weak practice would be deemed as staff not having regular feedback to identify and support their skills and knowledge and could result in poor outcomes for children (Care Inspectorate, 2022; Education Scotland, 2016).  Not engaging in programmes such as PRDs could be considered as weak leadership practice if current systems in place result in infrequent feedback or support that is not tailored to staff needs as PRDs would be. Smith and Tillema (2001) suggest that the purpose of PRD varies and can achieve many improvements for individuals such as new learning and development and accountability for promotion. However, Cleveland et al. (1989) argue that when PRDs are not clear they can become misleading.

**Local Policies**

Within GCC there are many localised policies to support PRDs and staff development, such as the annual service plan and improvement report ASPIR (2021 – 2022). This report evaluates education services, recognising that all staff contributions are respected, and their skills development is encouraged to help improve outcomes for children. The development of staff knowledge, skills and abilities has consistently been viewed as the foundation of organisational development and improvement within GCC (GCC, 2021-2022). GCC suggest that the promotion of leadership at all levels within your ELC setting will undoubtedly create effective cultures for success. In comparison, GCC's (2023) strategic plan supports learning collaboratively, including leadership at all levels to prevent overreliance on one leader, and one senior leadership team. This supports the PRD process that would encourage staff to lead their own development, therefore enabling GCC's improvement plans.

**Professional Development**

Both EYPs and teachers are expected to engage in mandatory continuous professional development (CPD), however EYPs have more autonomy as to how this is recorded, with no requirement to have this signed off by a senior leader. There is however an expectation from the Scottish Social Services Council (SSSC), the ELC workforce's registration body, that a record of development will be kept. EYPs may or may not be asked to show this to the SSSC. This differs significantly from the teaching profession, as General Teaching Council (GTC) registration requires teachers to record annual training and development (in Glasgow this is done through CPD manager, some local authorities have their own system, and others use the GTCS website). The record is then signed off by a senior leader. I have found no clear reason in any literature or policy explaining this disparity. Similar issues have been highlighted in recent research in England (Sakr & Bonetti, 2023) where they have found an inconsistent approach in the recording of CPD across early years settings. This has resulted in a lack of data being collated and gaps in this research field.

Higson and Wilson (1995) suggest that employees can move onto their next training goals when their professional development is signed off, and Kelly and McDiarmid (2002) argue that engaging in CPD leads to improved and updated skills, demonstrating more competence in the job role. When there is strong pedagogical content shared and developed in a professional learning community, greater

professional success is achieved (Sparks, 2002) and it is crucial that staff know the leader's character, and trust that the leader has faith in them, caring about their success as individuals, which can be achieved from leading by example (Buck, 2018).

I have highlighted a disparity in the mandatory requirement of teachers' CPD to be signed off, while EYPs CPD is not.  There is potential here to explore this topic further and to inspire change for the professional recognition EYPs deserve.

Having outlined the literature significant to my research, I will now situate the study giving more detail of the paradigm and discuss my methods and methodology.

## Methodology and Methods

According to Khun (1970) all research must take place within a paradigm, which he describes as a research culture defined by commonality of purpose.

One paradigm which underpins empirical research is the interpretivist paradigm, which views reality as a social construction as it is recreated by human minds and enlightens and adds to a greater conversation.  This is particular to this study, as all data was generated and interpreted from practitioners' perceptions based on memory and experiences. The axiological assumption presumes that I, as the researcher, am impartial and have unbiased values, opinions and personal feelings and I am not connected to the research (Cohen et al., 2011; Guba & Lincoln, 1994).

A thematic analysis using the Braun and Clarke (2006) framework was utilised, as I identified themes in opinions, practice and experience from practitioners' points of views. Data was first collected from an anonymous online questionnaire. Being the participants' line manager, anonymity was imperative to provide a safe platform for participants to speak freely, without fear of judgement and repercussions. This produces more validity and honesty of experience (Johnson, 2010).

The second data gathering method chosen was a focus group because this allowed an in-depth discussion between professionals. As there were only six participants, this generated a deeper conversation around the themes and trends identified from the results of the questionnaire. Holloway and Wheeler (2013, p. 127) suggest that, for participants to have their voice heard, discussion groups should be relatively small. In the Findings section, the participants who completed the questionnaire are referred to as P1Q, P2Q etc, and the participants in the focus group are referred to as P1FG, P2FG etc.

I was compliant with ethical guidelines from the British Educational Research Association (BERA) (2024) and the University of Glasgow. On its own, ethical goodness is not sufficient; good methods of gaining data are also vital as, although it is essential to be ethical, this alone will not ensure quality (Groundwater-Smith & Mockler, 2007). Good ethical practice and values contribute to further validity of the study.

## Findings

This study involved a group of EYPs in differing job roles participating firstly in a questionnaire, exploring their experience of PRDs and enquiring about EYPs perceptions of their purpose and relevance.

### Questionnaire

From the 19 participants who completed the questionnaires, eighteen said they had engaged in a PRD, and one said they had not yet received one.

When addressing whether participants were aware of the purpose of PRDs, almost all mentioned improvement and development and some indicated that their PRD linked to the school improvement plan. Participants highlighted that PRDs provide an opportunity to meet and discuss their development and careers aspirations with a leader.

> It's a chance to review your development as a staff member. It is an opportunity to agree goals and objectives and should be viewed as a discussion between yourself and your manager (P9Q).

Almost all participants said the HON or the depute facilitated their PRD using a coaching style. This allowed discussion pertaining to the culture of leadership of learning in the participants setting. Goleman (2000) believes that leaders who coach employees can help them to identify their strengths and weaknesses and believe in their own potential.

Participants were then asked to consider if having a PRD enhanced their skills and professional development (PD), and if so in what way.  All but one of the participants highlighted that their PRD was relevant and purposeful, and led to increased knowledge, helping them progress in their job roles and informing their practice.

> I have been able to take forward one of the opportunities identified already and use that to gain knowledge for my future professional development (P11Q).

> Yes, I believe it's important to have the time to share your vision with your manager and also receive that support and guidance (P10Q).

> I think they are purposeful when they are carried out collaboratively with your manager and they have a clear structure (P11Q).

Indicative questions, derived from themes which emerged from the responses to the questionnaire (Table 1), were shared with participants to consider before commencing the focus group discussion.

**Table 1**
*Themes from Questionnaire*

| Participants' answers | Categories | Themes |
|---|---|---|
| Self-development | Practice | Professional development |
| Training | Coaching | |
| Evaluation | Knowledge | |
| Reflection | Skills development | |
| Opportunity | Progression | |
| Feeling supported | Collaboration | |
| Gaining new knowledge | Self-development | |
| Encouragement | Professional growth | |
| Motivated | | |
| Confidence | | |

**Focus Group**

Six participants, comprising depute head, child development team leader, three child development officers and one support for learning worker, attended the focus group. Following this the answers given were analysed through an inductive process, using the Braun and Clarke (2006) approach to thematic analysis looking for similarities, patterns and traits in experiences of PRDs. Discussions mainly centred around three inter linked themes (Table 2), related to the main topic of the process and potential of PRDs in ELC.

**Table 2**
*Themes from Focus Group*

| Participants' answers | Categories | Themes |
|---|---|---|
| Friendly leader<br><br>Made to feel relaxed<br><br>Informal<br><br>Coaching and mentoring<br><br>Listened to<br><br>Valued<br><br>Distributed leadership<br><br>Scaffold | Relationships<br><br>Feelings<br><br>Styles of leadership<br><br>Support<br><br>Culture | Leadership |
| Nicer learning environment<br><br>Children actively engaging in learning experiences<br><br>Relationships formed with families<br><br>Staff learning from each other | Raising attainment<br><br>Reflection<br><br>Change<br><br>Self-evaluation | Impact on provision |
| Distributed leadership<br><br>Opportunities to learn<br><br>Own areas for development valued and respected<br><br>Confident<br><br>Leading<br><br>Skilled<br><br>Effective in job role | Further education<br><br>University<br><br>Promotion<br><br>Skilled | Professional development |

The six participants who volunteered for the discussion group all had experience of engaging in PRDs. Participants had a minimum of 5 years' working experience, with 3 participants having over 20 years' experience, however this did not mirror the number of PRDs participants had previously engaged in (Figure 1).

**Figure 1**
*Previous PRDs Compared to Working Years*
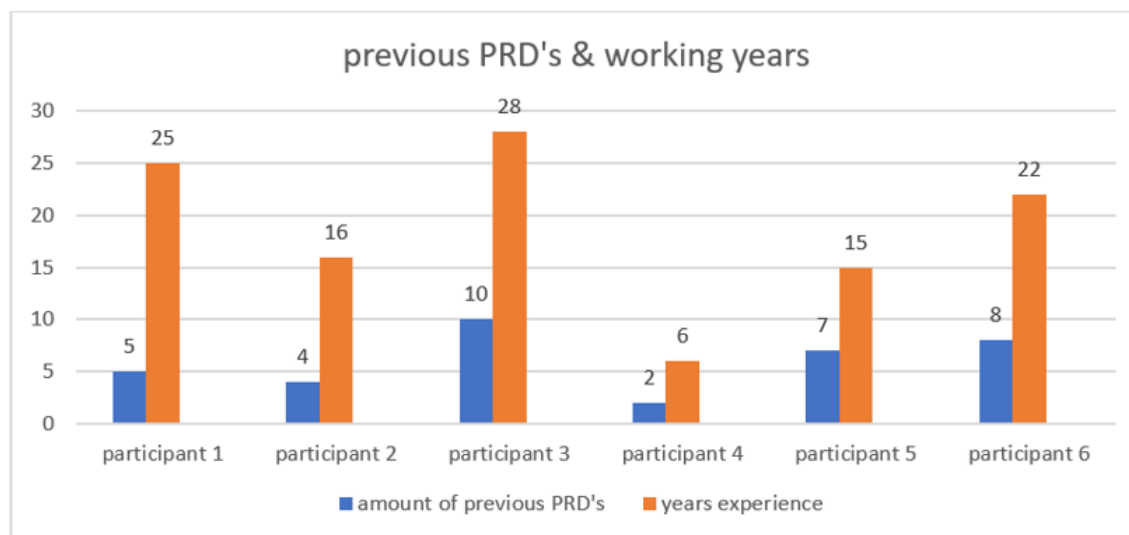


> I have only ever had four PRDs in 16 years and two of them have been in the last two years and what a difference I have found in the past few years (P2FG).

This echoes my own experience of PRDs, however, as the researcher, I aimed to remain impartial, in line with Groundwater-Smith and Mockler's (2007) ethical guidelines. This posed the question as to why staff had not received a PRD if guidance and documentation suggest otherwise. Buck (2018) discusses leaders who can get stuck in their leadership journey, failing to make necessary changes to their approach or beliefs to lead improvement, which Elmore (2008) refers to as the "default culture" because it suggests that practice has rarely changed.

**Focus Group: Leadership**

Participants shared their thoughts and experience of leaders who had influenced their PRD, either positively or negatively. Rodd (2006) highlights that one aspect of a leader providing support to their staff is recognising the importance of optimising adult learning styles. By doing this, leaders will understand the principles underpinning adult learning and develop the skills required to improve professional performance in their staff team. Leaders who are supportive, open, respectful and collaborative, encourage their staff to become reflective practitioners thus displaying leadership skills that are deemed effective (Rodd, 2006).

> I have very much been influenced as a support for learning worker as my ideas have been welcomed and I have been allowed to develop the nursery, not only working with the children but the environment. I have been fully supported by the leader (P2FG).

The discussion then focussed on whether participants thought there was a particular leadership style most suited to facilitating PRDs. Participants spoke about how the leader and the coaching style used made them feel more relaxed and at ease. Coaching in ELC is another collaborative method designed

to promote EYPs' ability to provide quality provision (Rush et al., 2003). Effective leaders use coaching to help staff collectively achieve goals, and their individual potential, by permitting staff to find their own answers to facilitate change and development (Drever, 2002).

> It was delivered by my manager and although it was formal it was informal as I felt comfortable and that I could open up freely and it wasn't like an interview that just relaxed me so coming from a way that was delivered to me was more personal and freer flowing you could speak your truth, and I was more comfortable (P5FG).

> The coaching model was very personal to yourself, and it is you that is setting your own targets (P6FG).

**Focus Group: Impact**

The next discussion centred around PRD's potential impact on the learning provision. The focus group participants were asked to consider if there was a noticeable impact on the provision as a result of their own PRD and if this impact would still happen if there had been no PRD facilitated. Many participants did not fully answer this question and only a few mentioned positive impact on the learning provision. Mooney and McCafferty (2005) suggest that some people might not see the importance in the job role of EYPs and it is work that does not require specific skills or attributes. However, Hallet (2013) disagrees with this and believes lots of the ELC workforce, many of whom are graduates, are acting as change agents to lead and improve ELC practice.

> I have seen the impact, especially with the environment with the lights etc. The children are calmer, and it helps to regulate and manage distressed behaviours especially in our children with additional support needs or younger children. Children are feeling more happy, safe and secure (P2FG).

> Through my PRDs, one in particular resulted in a change of relationships with families as I was learning new ways of working and how to be more inclusive in my practice to enhance family engagement (P3FG).

The participants were then asked to consider the importance of the relationship with the facilitator of their PRD, affording thought to, if a total stranger facilitated it would it be just as effective? Most participants said that the relationship they had with their leader was important, as this affected how they felt before, during and after their PRD. Today, leaders are required to adopt a supportive role to their staff, often absorbing and containing the anxiety that is unleashed in times of stress or uncertainty (Hirschhorn, 1998; Schein, 1983).

Michael Fullan (2001) highlights that relationships, moral purpose and organisational success are closely interlinked. Kouzes and Posner (2017) show that the value that separates effective and ineffective leaders is the degree to which they care about the people they lead, indicating that leaders need some basis of a relationship with their team.

> One of my PRDs I had no relationship with the manager, and I worried the whole time about what he was thinking about me. I thought he was not interested in what I had to say and had no value of me. In my opinion having a positive relationship with the leader who is delivering your PRD really matters (P1FG).

> I think it does make a difference having a relationship with the manager as if you can feel at ease and relax with your leader and your leader/manager values you and your skills, then it makes you develop and learn a whole lot better (P2FG).

> I think having a relationship with the leader helps as if it was a stranger I would personally hold back and not feel so relaxed (P5FG).

> I had my latest PRD with a new manager, and it gives us an opportunity to get to know each other and build a relationship (P4FG).

The last part of the discussion centred around the relevance and purpose of PRDs in ELC. Although aspects of this were already evident throughout participants previous responses this was a direct question to ensure clarity and validity.

> I think personally PRDs are important because it gives staff a focus and a plan. We are accountable to the SSSC and GCC and as we have a certain amount of CPD we need to do yearly (P6FG).

> Our development needs to evolve like the world we are living in and how we do that could be up for debate. PRDs in one way you can inspire staff to develop further and continue to learn and develop just as their job role changes and develops (P1FG).

> We are prime educators and what we do for the children is important, so we need to be skilled. PRDs can support you to learn new things and I think they are relevant and purposeful. I am 60 and would like to think I have fresh ideas in me and want to keep learning. I look to my management to support me (P3FG).

> We all have standards and codes of practice to adhere to whether we like it or not. There has to be a beginning, middle and end rather than just a tick box exercise. Things are changing so fast, and I am doing a PGD but in a few years' time it will be all different again and more to learn. You need to be constantly upskilling yourself all the time (P4FG).

From the data gathered, almost all participants value the PRD process, if they are carried out by a supportive leader who invests in the process themselves, affording their time, value and respect. Fullan (2001) believes that if you do not treat others fairly you will be a leader without followers, and Stark and Flaherty (2010) emphasise the importance of leaders respecting staff views and opinions.

**Focus Group: Professional Development**

Almost all participants have seen a positive impact from their PRD either on their own continuous development or in their practice. However, one topic that did arise at this point in the conversation was around leaders' and the local authority's investment in PRDs, particularly concerning the mandatory recording of CPD for teachers but not EYPs.

One participant highlighted that her husband is employed by the same authority in the teaching profession, and she does not understand why his CPD gets signed off each year and EYPs' do not. This could pose the question/theory that his CPD is deemed vital to his development and career and therefore gets recorded and validated. This type of information could be interpreted or misinterpreted by practitioners, potentially thinking their employers are less willing to invest in them in comparison to the teaching profession. This could then result in a demoralised ELC workforce, causing resentment.

> Comparing myself in early years doing a PRD and my husband in teaching doing his PRD, the accountability and recording is completely different. Both of us are responsible for professional development. In comparison under the same bracket of working in education within the same local authority, he is held more accountable. He must record everything online and at the end of the year his manager has to sign it off. Whereas my CPD it is me who is recording it as I

wish. I don't need to show it and get it signed. I think there has to be some uniform across PRDs and the recording of CPD (P6FG).

In my previous authority I had to bring a folder with me to my PRD of proof of training and development and it was good to reflect on and see how far you have progressed in a year. My previous manager in this authority asked me if I had engaged in any training and I brought out my folder and I was told no you don't need anything like this in Glasgow, we more or less trust you in what you are doing (P5FG).

Reflecting on the information presented in Table 3, you can clearly see the disparity between both professions in education.

**Table 3**
*Comparison of CPD Requirements for ELC Staff and Teachers*

| CPD requirements | ELC staff | Teaching profession |
|---|---|---|
| Record must be kept on CPD manager with a specific emphasis on impact | | * |
| CPD signed off yearly by line manager | | * |
| PRDs yearly | * | * |
| Leader sent alerts to remind them that staff CPD record needs signing off | | * |
| CPD action plan in place that generates a record | | * |

It is natural for staff to look inwards at their own practice, however Education Scotland (2016) recommend that we look outwards at what others do to progress. The focus group enabled practitioners to do this and display critically reflective practice which Education Scotland (2020) suggests is best done with others to add a fresh perspective.

Whalley (2008) emphasises that by reflecting on our practice we can identify if change is required or whether to maintain the current quality, through evaluating capacity for improvement. This group of participants were all in agreement that there should be some sort of uniformity across all aspects of education in relation to recording of CPD.

Feeling valued in the workplace by their line manager or the authority they work for is clearly important to this group of EYPs in this study. Goleman (1996) argues that leaders who lead with emotional intelligence and value people motivate colleagues to achieve a common goal. An aspect of future development would be for EYPs to feel valued and future research has the potential to explore this disparity across the education sector.

In my job role as ELC depute, I am responsible for staff's CPD manager. Previously I had to sign off an EAL teacher's CPD record who was based with us, yet there is no one who signs mine off. There is inconsistency here (P6FG).

Hearing that teachers are getting their CPD signed off makes me feel undervalued. I never knew that happened. I just thought we were all the same in education (P5FG).

We should all be treated the same. It is only fair. I have always felt different as a support for learning worker and wasn't valued the same as others up until a few years ago when this new leader started. I was made to feel the same as everyone else. This is when I really felt I was making a difference in my job (P2FG).

Finally, participants were asked what single words they would use to describe the benefits, limitations and future of PRDs (Table 4).

**Table 4**
*Participants' Views of the Benefits, Limitations and Future of PRDs*

| Benefits | Limitations | Future |
|----------|-------------|--------|
| Collaborative (P1FG) | Time (P1FG, P2FG, P5FG) | Crucial (P1FG) |
| Achievement (P2FG) | Funding (P3FG) | Empowerment (P2FG) |
| Voice (P2FG) | Staffing (P5FG) | Approachable management (P3FG) |
| Self-belief (P4FG) | Management (P6FG) | Self-development (P4FG) |
| Evolving (P5FG) | | Encouragement (P5FG) |
| Development (P6FG) | | Achievement (P6FG) |

I will now summarise the main three themes identified from the data.

**Leadership Influence**

The first theme identified from the data is leadership influence. Rolfe (2011) suggests that when leaders model good practice, they encourage, empower and motivate others to become leaders of learning. The leaders in this particular case study setting, as well as others mentioned, had a positive influence on the way PRDs were delivered. Participants commented on how they were made to feel, including relaxed, listened to, and welcomed by the coaching style of leadership used. However previous negative experiences were also discussed, highlighting the need for careful consideration of the leadership approach used to facilitate PRDs to ensure the approach is best suited to maximise the potential of PRDs. Evolving as a leader is not only a professional journey, but a personal one too, as everyone has unique skills, values and attributes (Mistry & Sood, 2015). As leaders we must recognise the potential impact our approach can have on EYPs, especially regarding PRDs.

**Impact on Provision**

The second theme identified from the data was impact on the learning provision. When analysing the data, it showed that participants struggled to detail the impact their PRDs had on the setting's provision. Reflecting on their responses, they may have found it problematic to articulate the actual impact and improvement on the provision from their own self-development. As the researcher I could not alter or shape the responses, however I did notice that the participants appeared to find

this challenging. This could be a future aspect of improvement and development for leaders and practitioners to consider.

**Professional Development (PD)**

Data highlighted that PRDs provide an opportunity to exemplify PD. McLaughlin and Marsh (1978) suggest the only way PD can be successful is when it occurs in settings that support the process. After reviewing the research data, the leader has the responsibility of supporting all EYPs in achieving and developing their professional status and becoming effective practitioners.

<div align="center">

**Conclusion and Recommendations**

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This research has afforded me the opportunity to share the perspectives, experiences and individual accounts of a group of EYPs in Glasgow, relating to the process and potential of PRDs.

**Summary of Findings**

There was an established culture of learning evident with this group of EYPs. Many participants were already in further education, attending university or independently accessing training. The participants articulated that one of the reasons they engaged in CPD was due to the PRD process. However, also identified was the fact that recording and signing off their CPD was non-mandatory and based on an aspect of *trust* from their employer GCC. This then highlighted disparity between EYPs and the teaching profession, who all work under the same bracket of education. Participants expressed feelings of being undervalued in their profession.

Participants highlighted receiving many opportunities to lead in their setting after identifying development goals during their PRDs. Evident here was leadership at all levels, embracing a culture where everyone matters, aligning with GCC's (2023) strategic plan.

**Implications on Practice**

Participants found it challenging to articulate the impact their PRD had on the provision, potentially highlighting areas for improving future practice. Firstly, for the leader facilitating PRDs to ensure staff have opportunities to learn new ways of capturing and recording data which enables them to quickly identify impact with more ease. Secondly, for staff to reflect and self-evaluate how their PD actually impacts on the provision. This study has already influenced my own practice through the introduction of an action plan for EYPs to record their own data, capturing the impact of their PD. I would urge the local authority to take cognisance of the findings of this research in regards to ensuring greater parity for EYPs mandatory recording and signing off of PRDs.

Involvement in this publication indicates GCC's collaborative approach and parity of esteem in delivering services across education. By engaging in networked learning, not only are we working towards one of the authority's grand challenges of networked learning organisation (GCC, 2022), we will be improving our service and valuing staff development through staff engaging in leadership at all levels and having access to CPD. This research could ignite discussion around the process and potential of PRDs and create an opportunity for professionals delivering PRDs to look outwards at what others are doing, ultimately improving their own practice and ensuring they are maximising the potential of PRDs in their settings (Education Scotland, 2016).

**Future Implications for ELC Practice**

My findings can inform practice across our authority by encouraging other leaders responsible for delivering PRDs to consider and reflect on the data in this study. Leaders will be required to invest in the process of PRDs and recognise the potential impact they can have on the provision by ensuring they facilitate them meaningfully and consistently each year. A commitment to developing PRD processes and realising the potential will help to build a professional learning community in ELC. In light of the ELC workforce expanding significantly, it is imperative that consideration is given by the local authority to address the mandatory consistent recording of CPD to mirror that of the teaching profession. EYPs are currently labelled as non-teaching staff however my findings confirm my own opinion that they deserve the same professional recognition and should be afforded the same investment as teachers, thus placing importance on the professionalism in the sector.

The data gathered has shown that PRDs can be a positive process for staff to use as a platform for reflecting, evaluating and planning future development. The tentative conclusions of my study suggest that there is a need for better systems for recording and monitoring of CPD consistently across ELC. The study also appears to support the argument for a change in the frequency in which PRDs are being facilitated and delivered in ELC.

In conclusion this case study confirms the importance of PRDs for creating opportunities for professional learning, highlighting that leadership was a key influence on the PRD's process and potential. This study offers evidence for promoting a shift in the culture of leadership, suggesting we must leave behind hierarchical authority. Instead, we should value developing relationships and processes to support the delivery of PRDs, enhancing and optimising conditions for learning for all (GCC, 2023). Due to the absence of current literature in the Scottish context of PRD relevance and purpose in early years, there is a call to explore this further.

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Tricia Mills is Head at Hilltop Nursery School in the south side of Glasgow. Tricia is currently responsible for a staff team of 35 early years practitioners. She has 26 years' professional experience in early years education, in Scotland, progressing through the years in job roles starting with CDO, team leader, depute and finally head of nursery. She graduated in 2017 with a BA in childhood practice then in December 2023, with an MEd in childhood practice at the University of Glasgow's School of Education. Patricia is passionate about leading in the early years sector and about driving forward change and improvements. She classes herself as a pedagogical leader who has been on her own self-improvement journey, developing from manager to leader.

## Acknowledgements

# How Have New Secondary Headteachers in Scotland Formed and Enacted Role Conceptions of Headship in Response to the Covid-19 Pandemic?

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**Abstract**

For new headteachers appointed around the time of the Covid-19 pandemic, many of the newly-required duties associated with school leadership were likely to be incompatible with their pre-appointment role conceptions of headship. This paper draws on the findings of a study which sought to: consider if - and, if so, in which way(s) - role conceptions of secondary headship in Scotland have changed due to the pandemic; and identify, describe and understand any supportive factors which allowed inexperienced headteachers to effectively enact these modified role conceptions, and thereby navigate associated flux and uncertainty. The paper explores potential future risks and challenges which may arise as headteachers lead school communities through an uncertain post-pandemic landscape of proposed transformative change. Recommendations which may mitigate these risks and challenges are made at the conclusion. The study - the findings of which form the basis of this paper - utilised a case-study design, involving collection and analysis of qualitative data through semi-structured interviews with three secondary headteachers appointed to roles within the same local authority area around the time of the Covid-19 pandemic, underpins the study.

*Keywords: new headteachers, role conceptions of headship, Covid-19 pandemic, post-pandemic landscape, navigating flux and uncertainty*

## Introduction

**Background**

*The Pandemic's Impact and Consequent Work Intensification for Scottish Headteachers*

The Covid-19 pandemic wrought change to headship in Scotland, as school leaders strove to maintain learning, wellbeing and inclusion provisions during an intense crisis period (Scottish Government, 2023a; Scottish Parliament, 2023). Work intensification followed, as the navigation of an erratic policy context necessitated effective communication, collaboration, and change (Fotheringham et al., 2022) across multiple areas. Headteachers led delivery of remote and blended learning, amidst logistical challenges obstructing equitable access to digital technologies (Kafa, 2023; Wharton-Beck et al., 2024), and developed capacity-building cultures in digital learning (Huber, 2021; Kafa, 2023; Thornton, 2021). They maintained connectedness within school communities without recourse to typical communication methods (Beauchamp et al., 2021), and liaised with partner agencies and families to safeguard vulnerable stakeholders' wellbeing (Wharton-Beck et al., 2024).

As relative normality returned, challenges remained. Staff and pupil absence (McKay et al., 2023; Wharton-Beck et. al., 2024) affected continuity of learning (TES, 2024a; Scotsman 2024), and challenging behaviour emerged, as pupils' emotional regulation capacities were affected by social isolation (Scottish Government, 2023b). The inequitable impact of "lost learning" widened attainment gaps (Elliot Major et al., 2021).

Headteachers felt "de-skilled" in this unfamiliar environment (Fullan, 2020), a contrast to pre-pandemic leadership confidence developed through stable role conceptions (Striepe et al., 2023). Headteachers' perceived vulnerability to professional exposure in assuming responsibility for others' wellbeing (Hulme et al., 2023); in a role already heavily-burdened with emotional labour (Purdie, 2014), they became more susceptible to anxiety and stress than other teachers (Nuffield Foundation, 2022) and their deputes/assistants, their emotional resilience dented by decreased energy and agency (Jopling & Harness, 2022). With limited headship experience to inform professional and organisational socialisation (Crow, 2016), and aware that professional learning for headship preparation had not readied them for crisis leadership, newly-appointed headteachers were less likely to have developed secure role conceptions and professional identities; this may have left them ill-prepared (Grissom & Condon, 2021).

**The Post-Pandemic Landscape: Proposed Transformative Change**

In 2020, Scottish Government commissioned *Scotland's Curriculum for Excellence (CFE): Into the Future (OECD, 2021)*. Its recommendations, accepted by Scottish Government (Scottish Government, 2021), proposed re-assessment of CfE's "aspirational vision against emerging trends in education" (p. 13), and Senior Phase adaptions reflecting alignment with curriculum, qualifications, and CfE's overarching vision. In 2021, *Upper Secondary Education Student Assessment in Scotland: A Comparative Perspective* (Stobart, 2021), contrasted Scotland's approaches to Senior Phase assessment and qualifications with international models. In 2022, *Putting Learners at the Centre: Towards a Future Vision for Scottish Education* (Scottish Government, 2022) explored how reform of SQA and Education Scotland, as advocated by OECD (2021), could be achieved. In 2023, *All Learners in Scotland Matter* (Scottish Government, 2023a) was published, the final report on the National Discussion on the future of Scottish Education. In June 2023, *It's Our Future - Independent Review of Qualifications and Assessment* (Scottish Government, 2023c), the final report of a review group chaired by Professor Louise Hayward, conveyed proposals for equitable, future-oriented approaches to assessment and qualifications.

The pandemic's impact has driven this transformational change agenda (Scottish Government, 2022a, 2023a, 2023c; Stobart, 2021). *Putting Learners at the Centre* (Scottish Government, 2022) argues that Scottish Education has experienced regular change, supported by thematically-congruent, equity-promoting policy. However, the report views policy to be mis-aligned and over-abundant, directing headteachers' attention from leadership of learning towards bureaucracy; he speculates that the pandemic has exacerbated this. The National Discussion followed the pandemic, and its report (Scottish Government, 2023b) moots the likelihood that "continuing impacts on health, wellbeing, equity and learning" (p. 4) stirred stakeholders' concerns for Scottish Education's "present and future realities" (p. 4). Similarly, both *It's Our Future* (Scottish Government, 2023c) and Stobart's (2021) review reference post-pandemic flux, and its highlighting of injustices within our qualifications system as stimuli for reflection and change.

**Aims**

The paper seeks to explore headship's significance in navigating uncertainty, and elicit reflection on how school leadership could evolve to meet shifting demands of future societies and crises. By focusing upon new headteachers' formative leadership experiences during and since the pandemic, the author seeks to comprehend how role conception is shaped by often-unanticipated contextual

and situational influences, acknowledge enduring effects of continuously-evolving role conceptions, and identify, describe and understand supportive influences allowing headteachers to effectively enact modified role conceptions.

## Literature Review

### Ethical Leadership of School Communities

The pandemic initiated reflection upon schools' purposes. Schools provided stability and routine (Striepe & Cunningham, 2022), normality and care (Lien et al., 2023), opportunities for community service and socialisation (O'Connell & Clarke, 2020), and a "point of connection" alleviating trauma and isolation (Fogg, 2023). Headteachers became community "anchors" amidst the turmoil (Longmuir, 2023).

Schools' focus was the core purpose of *care* (Beckmann & Klein, 2022; Kim et al., 2022; Longmuir, 2023; Reyes-Guerra et al., 2021; Striepe et al., 2023). Care facilitated community and connection (Longmuir, 2023), particularly for vulnerable families (Striepe et al., 2023), and allowed schools to function in subsequent delivery of learning (Longmuir, 2023). Organisations, operating within an uncertain climate, built trusting and resilient cultures (Ahlstrom et al., 2020); Weiner (2021) posits that cultivating "psychological safety" ensured staff, within a compassionate ethos, still felt supported to learn and change.

Headteachers' community leadership required varied leadership approaches**.** Care, community and values (Forde et al., 2022) underpinned a compassionate, self-aware *people-oriented leadership* (Lawton-Misra & Pretorius, 2021). Headteachers fostered the collective good through *emotional leadership* (Beauchamp et al., 2021; Brown et al., 2023) and marshalled support within their communities through *entrepreneurial leadership* (Kafa, 2023). *Community leadership* involved working with partner agencies to safeguard the wellbeing of vulnerable families during lockdowns (Hulme et al., 2023), reconfiguring pedagogy and environment to acknowledge pupils' trauma (Whittaker & Kniffin, 2020), and taking a "genuine interest in [stakeholders'] inner world[s]" (Schechter et al., 2022, p. 3) to better meet their social and emotional needs (Mutch, 2015; Schechter et al. 2022, adapted from Goswick et al., 2018).

### Crisis Management

Headteachers had no preparatory crisis management training (McLeod & Dulsky, 2021) and no prior experience (McLeod & Dulsky, 2021; Varela & Fedynich, 2020), but were expected to be expert and to improvise (Lien et al., 2023), managing risk under time constraints and with few resources (Argyropoulou, 2021). Crises challenged hitherto accepted conditions for effective school leadership, particularly a reliance on "organisational stability, hierarchy and standardised practice" (Torrance et al., 2023, p. 11).

Headteacher crisis management requires specific attributes (Beckmann & Klein, 2022), such as responsiveness, instinctiveness and virtuousness (Striepe & Cunningham, 2022), tenacity (Reyes-Guerra et al., 2021), perseverance (McLeod & Dulsky, 2021); moral courage (O'Connell & Clarke, 2020; Reyes-Guerra et al., 2021), and optimism (Longmuir, 2023; Reyes-Guerra et al., 2021). Headship in crisis involves calmness and stability (Longmuir, 2023), leadership presence (Argryopoulou, 2021) and visibility (Mutch, 2020), and empathy towards others' emotional responses (Koehn, 2020). Shared values precipitate collaborative sense-making (Macleod & Dulsky, 2021) and a collective community identity, which facilitates a coherent, unified vision of desired outcomes (Beauchamp et al., 2021; Brown et al., 2023).

Technical skills in the immediate "crisis phase" (Thornton, 2021) include developing organisational capacity for anticipation and understanding (Vakilzadeh & Haase, 2021) of crises' implications through "signal detection" (Wooten & James, 2008), and sense-making amidst uncertainty (McLeod & Dulsky, 2021), incorporating varied perspectives (Boin & Renaud, 2013; Thornton, 2021).

Communication focuses on synthesising, interpreting and conveying (Longmuir, 2023) information to stakeholders, facilitating meaning-making and understanding (Brown et al., 2023; MacLeod & Dulsky, 2021), and building trust (Striepe & Cunningham, 2022); Headteachers seek to reduce "ambiguities or uncertainties" (Longmuir, 2023) and "unpredictability" (Lien et al., 2023), and offer hope (Argyropoulou, 2021) though positive visualisations of the future (Thornton, 2021).

Headteachers promote organisational resilience, by adapting existing processes (Barton et al., 2020; Brown et al., 2023) for coping with urgent issues (Beckmann & Klein, 2022). In the "opportunity phase" (Thornton 2021), reflection, learning and subsequent adaption take place (Beckmann & Klein, 2022; McLeod & Dulsky, 2021). Headteachers' contextual awareness supports interpretation of how crises affect their context (Mutch, 2015), and accurate identification of accessible resources for crisis management (Argyropoulou, 2021).

**Adaptive, Collaborative and Distributive Modes of Leadership**

Adaptive leadership necessitates sense-making (Chatzipanagiotou & Katsarou, 2023), and contingent adoption of diverse leadership styles (Beauchamp et al., 2021). In flux, where organisations must balance stability and flexibility to withstand or adjust to external pressures, leaders restructured the organisation (Ahlstrom et al., 2020), identifying urgently-required change, and broader adaptions required within the new environment (Bagwell, 2020; Northouse, 2019; Torrance et al., 2023).

Distributed and collaborative leaderships were operationally expedient due to the overwhelming volume of change (Brown et al., 2023, Harris & Jones, 2020a; Torrance et al., 2023) and the need to utilise available capacity to respond (Beckmann & Klein, 2022). They were vital in establishing shared commitment amongst stakeholders to schools' responses to emergent issues (Chatzipanagiotou & Katsarou, 2023; Mowat & Beck, 2023), delivering change and improvement (Forde et al., 2022), and in bolstering the headteacher's resilience (Beauchamp et al., 2021). The pandemic precipitated collaborative strategies including bridging (building networks with other leaders and partner agencies), brokering (fostering shared understandings and language with partner agencies) and buffering (cultivating alliances with those who may support in addressing challenges) to facilitate more purposeful collegiality (Hulme et al., 2023 adapted from Asada et al., 2020).

**The Pandemic as a Stimulus for Leveraging or Leading Change**

Headteachers may be expected to "[build] back better" (Chapman & Bell, 2020) to support greater equity within post-pandemic societies, requiring: critical reflection on systemic features which inhibit fairness, equity and equality (Reyes-Guerra et al., 2021), particularly, from an ethical perspective, for those typically marginalised (Ahlstrom et al., 2020); a more comprehensive reconceptualization of education's purposes (Chapman & Bell, 2020); and understanding how, in pursuing equity, schools fit into wider society (Sahlberg, 2021).

However, barriers to sustaining equitable change remain; historical inequalities have been worsened by the pandemic's impact (World Bank, 2020) and new inequalities have emerged (Argyropoulou, 2021); governments' post-pandemic austerity policies may preclude transformative change (Sahlberg, 2021); school leaders - focusing on protecting organisational stability during pandemic crises - may now find it difficult to engage in the disruption to existing systems required by strategic change (McLeod & Dulsky, 2021

**Method and Methodology**

The study underpinning this paper was undertaken to support the dissertation element of a Masters of Education (Educational Leadership) programme. The following research questions gave focus to the study:

1. During the pandemic, how was role conception of headship shaped for those in early headship?
2. Since the pandemic, how is the role conception of headship being shaped for newly-appointed headteachers, and what similarities or differences are perceived in comparison with role conceptions developed during the pandemic?
3. Which factors were perceived to support newly-appointed headteachers in managing unanticipated or challenging responsibilities associated with revised role conceptions, developed during and since the pandemic?

**Data Collection**

Headteachers' *role conception* is a subjective, nuanced, context-dependent, and ethnographically and phenomenologically-influenced concept, and should be distinguished from *job description*, its more stable and codified counterpart. Role conception is shaped by individuals' interpretations and assumptions regarding duties, skills, knowledge, attitudes, norms, behaviours, values, and relationships they associate, formally and informally, with headship. School leaders' realities during and since the pandemic were experienced, interpreted and understood subjectively, and socially constructed by varied contextual and situational factors; these include schools' preparedness for change, headteachers' access to support networks, and the emotional milieu (affected by pandemic-related anxieties) inhabited by stakeholders. Thus, an Idealist worldview, recognising the primacy of individuals' socially-constructed realities, corresponds with an ontological focus on the subjective interpretations of participants' leadership experiences.

Interpretivist epistemology necessitates an understanding of not only *what* has happened, but *why,* a benefit offered by qualitative methodologies (Baumfield et al., 2012). A semi-structured interview with each participant (three secondary headteachers appointed around late 2019-mid-2021 – see Table 1) was undertaken, offering scope for the researcher to fully absorb participants' ethnographical biographies (Brinkmann & Kvale, 2019; LeCompte & Preissle, 1993). A standardised open-ended interview structure (Patton, 1990), where uniformly-worded and sequenced questions were given to participants beforehand, limited deviation from literature review themes (see Figure 1) underpinning interview questions, and facilitated systematic data analysis.

**Table 1**
*Sampling and Participant Detail*

|  | Known as | Sex/Gender | Type of School | Context | Appointed |
|---|---|---|---|---|---|
| Participant 1 | P1 | Female | Mainstream with co-located Additional Support Needs unit | Urban with high levels of socio-economic deprivation | Late 2019-mid 2021 |
| Participant 2 | P2 | Female | Mainstream with co-located Additional Support Needs unit | Urban with very high levels of socio-economic deprivation | Late 2019-mid 2021 |
| Participant 3 | P3 | Male | Mainstream | Urban with very high levels of socio-economic deprivation | Late 2019-mid 2021 |

**Figure 1**

*Interconnections between Literature Review Key Themes and (Selected) Sub-themes*
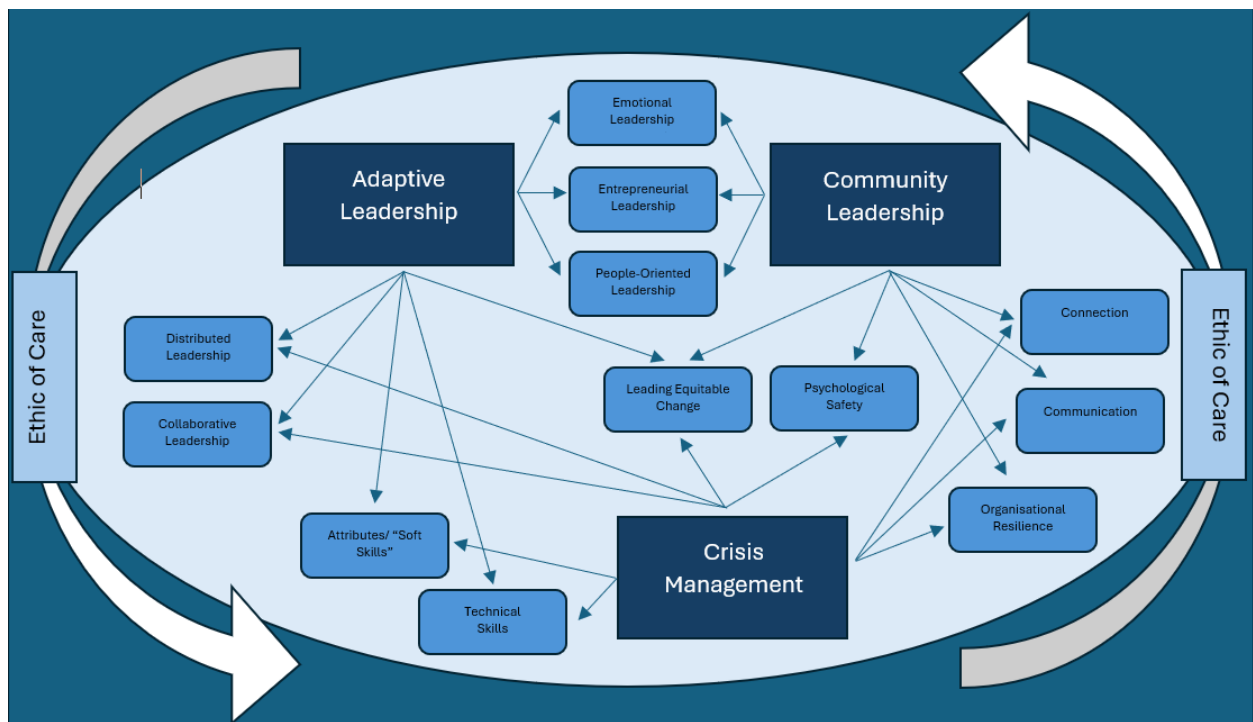


Headteachers appointed around late 2019 to mid-2021 (who led during the pandemic, but had formed pre-appointment role conception of headship prior to the pandemic) experienced particular challenges in establishing stable role conceptions and professional identities in their formative months of headship. Purposive sampling (Coleman, 2012) of criteria-meeting Headteachers, seeking balance between variety (Marshall, 1996) and homogeneity (Maxwell, 2009), was needed (taking into account age, gender, school context, etc.) if findings could be felt relevant to the sampled ethnographical community.

**Data Analysis**

Transcribed data was coded descriptively and deductively in a concept-driven way (Gibbs, 2008), using themes recurring within the literature review, "[finding] patterns" and "[rendering]" these into something communicable (Elliot, 2018, p. 2853 and p. 2851). Inductive coding of unexpected responses was permitted so as to allow for the consideration of alternative ideas or conclusions (Saldana, 2013). The high number of initial codes presented challenges for subsequent categorisation, so data was re-coded by subsuming sufficiently synonymic codes. Codes were then categorised, in order to "identify key relationships that tie the data together into a narrative" (Maxwell & Miller, 2008, p. 467) and highlight generalisable participant experiences.

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**Findings and Discussion**

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**Role Conception in Early Headship During the Pandemic**

Role conceptions were influenced by pandemic-related situational challenges. For all participants, leadership of change was focused on existing unique contextual needs or issues exacerbated by the pandemic, and, accordingly, the assumption of responsibilities relevant to the ethic of care (Beckmann & Klein, 2022; Kim et al., 2022; Longmuir, 2023; Reyes-Guerra et al., 2021; Striepe et al.,

2023) and community leadership. Participant 2's (P2's) school - in an area of socio-economic deprivation - saw greater health and wellbeing challenges (e.g. illness and bereavement), which then intensified learning and teaching challenges, such as pupil disengagement (e.g. erratic attendance); less contact with vulnerable pupils affected the capacity of P2's school to resolve wellbeing inequities by developing safe relationships with adults, a key contextual focus. Participant 1 (P1) perceived conflict within relationships, influenced by increased regularity of dysregulated pupil behaviour. Covid-19 restrictions made developing positive relationships more challenging, as ethos-building activities - engagement in sport or performing arts - were curtailed; in P1's view, "the joy was taken out of school".

All participants tackled learning and teaching challenges related to the pandemic's highlighting of attainment inequities. P2 saw causal links between lost trust and pupil disengagement.

> I think that stakeholders lost a sense of trust in our assessment processes because of the botches during the pandemic but also because there was a spotlight put on how we do it, and actually suddenly families and children were saying, "no, actually that isn't fair" . . . Societally, I think, what happened was the trust in schools and the school system has diminished somewhat, and as a result you end up with a day a week absence.

**Factors Supporting Enactment of Headship During the Pandemic**

Mitigation of pandemic-related situational challenges, such as work intensification, required networks, particularly with peer headteachers, and in P1 and 3's cases, building relationships, in order to facilitate collaboration and communal sense-making. Deeper contextual understanding through ongoing organisational socialisation informed and supported contextually-responsive leadership.

A support in leading change was collaboration with and involvement of staff, reflected in the modes of leadership used: P1's cultivation of a shared senior leadership team (SLT) vision, use of a staff working group to drive policy change, and willingness to resource innovative change suggested by staff, and P2's creation of Pupil Equity Fund[1] (PEF) middle leadership posts focused on delivering key school improvement outcomes. A compression of leadership structures and hierarchies (Brown et al., 2023) led to distributed practices; disrupting conservative hierarchies encouraged differing perspectives of leadership (with a greater emphasis on capacity building and relationships) to emerge (Mitchell et al., 2023). In contrast, and largely due to the urgency of operational necessities, P3 used a pace-setting leadership approach, prioritising a "clear statement of intent" over consultation. There is precedent for this decisiveness within existing research. (Mutch, 2020; Striepe et al., 2023).

**Role Conception Since the Pandemic**

Role conceptions continued to be shaped by contextual needs, which impacted upon foci in leadership of strategic change, and encouraged enactment of servant leadership. P1 attributed her "hands-on" approach to an intention to "model" the leadership of change she desired. Similarly, P2 felt that role conception and servant leadership were related to the headteachers' community context, which was only knowable post-appointment.

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[1] Pupil Equity Funding, as part of Scottish Government's Scottish Attainment Challenge policy, is money distributed to schools to be used by headteachers to improve outcomes for young people affected by poverty.

> You can't see yourself in a place until you're in a place, so you don't know how protective you are going to become and . . . You know, righteous anger about how communities like this get treated, and the distribution of wealth, and about what they lack and how that impacts them. (P2)

Both during and since the pandemic, community leadership was key in participants' headships; though this aspect "[takes] over life", P2 spoke of becoming "invested in" rather than "resentful" of this. P2 felt the breadth of community leadership responsibilities more pronounced than anticipated, as schools have a "resonating presence"; interpersonal capacities involved high visibility (being "on display"), approachability ("being present and listening"), ethical responsibility and selflessness ("having to care about everything" and "[putting yourself] second"), and the ethic of care:

> It's got a kind of element of . . . being about guidance and support in a way that I think I hadn't maybe seen it. (P2)

Since the pandemic, however, participants had developed awareness of community leadership's challenges. Participant 3 (P3) saw that, as other services "struggled to function" in an austere climate, schools would do more, and would be "making more of the bigger decisions locally". Participants 1 and 3 saw challenges for headship amidst a growing expectation of schools' provision of a universal service; P1 saw school as the "last man standing" in a climate of austerity, and suggested that strategic changes delivered at school level were replacing provision previously offered by other agencies. This trend would, she felt, affect the breadth of the role in "what [headteachers are] expected to do."

**Factors Supporting Enactment of Headship Since the Pandemic**

All participants sought, in leading change, to build on successes achieved in tackling contextual challenges identified during the pandemic; this fostered momentum, relational trust, and coherent priorities. For P1, this meant meeting the needs of vulnerable learners, and making practical changes which had observable and measurable impact on relationships, behaviour management and attainment. Having established greater consistency in quality assurance (of classroom experiences and attainment), P3 detected a cultural shift, with colleagues more assured of capacity for collective efficacy ("what can be achieved when we work together"), and with greater shared confidence in their scope to "add value" to the experiences and outcomes of pupils; a "togetherness" and organisational resilience - in that previously-lacking systems were embedded - emerged.

Participants 1 and 2 led a deepening cultivation of relationships, collaboration, and distributed modes of leadership. P1 appointed a depute to her SLT, whilst P2 utilised partner agencies to tackle specific issues (for example, support for mental health) and utilised distributed leadership through her PEF team of principal teachers and a depute to address targeted issues (delivering an alternative curriculum and improved pastoral support for the vulnerable). A qualitative focus on stakeholder views was resonant in facilitating sense-making (Chatzipanagiotou & Katsarou, 2023) with trusted colleagues within the context (new SLT, for instance, for all participants) or with wider groups of stakeholders (such as working groups of staff or surveys for P1). This sense-making cultivated a richer and nuanced understanding of urgently significant contextual challenges, and encouraged "transition . . . away from simplification and towards complexity" (Aldrich & Rudman, 2015) and engagement with ". . . complications, tenuousness . . . irregularities, [and] contradictions . . ." (Clarke et al., 2007). Participants built trust through openness, and by granting influence to others (Tschannen-Moran & Gareis, 2015), before building towards psychological safety (Weiner, 2021) which allowed support but also challenge to underpin discussions around future priorities.

Participants 1 and 2, in identifying where collaborative approaches had been used fruitfully, highlighted areas where there was potential for challenge, or even conflict, controversy or dissonance (P1's efforts to address dysregulated pupil behaviour by focusing on the needs of the most disruptive, and P2's creation of PEF-funded middle leaders with responsibilities focused upon neglected aspects of depute remits); this evidences commitment to a collegiality circumventing common critiques of superficial and politically-expedient forms (Fullan & Hargreaves, 1992; Hargreaves, 1994) and instead welcomes difference as a prerequisite for coherent sense-making (Fullan, 2001).

Growing contextual awareness through continued organisational socialisation, commonly experienced as new headteachers engage with the knowledge, values and behaviours most required within this new context (Crow, 2007), ensured that P3 was focused, in leading change, on priorities most important to staff, such as pupil behaviour. He noted an occasion where he unsuccessfully attempted to pursue change, and attributed this to a "misjudgement" of the level of feeling (regarding the change's perceived focus) across the school and within professional associations. Organisational socialisation - reciprocally *fostered by* and *fostering* deeper engagement in relationships and collaboration with colleagues - enabled the enactment of role conception, specifically where this emphasised the need for contextual responsiveness.

**Future Challenges: Unstable Role Conceptions**

Participants expressed concern regarding headteachers' capacity to effectively lead school communities though a proposed national transformative change agenda. Speculating on how future role conception may evolve within an educational, social and political landscape still susceptible to flux, participants saw risk in the resourcing constraints currently experienced within public services.

Whilst P3 saw opportunity to begin national conversations about systemic inequity, he saw risk, specifically in the Personal Pathway element of the proposed Scottish Diploma of Achievement within *It's Our Future* (Scottish Government, 2023c); its intention to "shine a light" (p. 73) on historical and systemic societal inequity of access to cultural capital might reinforce unhelpful self-fulfilling narratives about poverty and social immobility.

> . . . you're shining a light on, 'by the way, you're living in poverty. Do you realise that? Compared to other people, you're not doing as well.' (P3)

For Participants 1 and 3, leading school communities with high levels of socio-economic disadvantage where the impact of poverty-related attainment gaps are keenly felt, there was concern that the Personal Pathway element may, in fact, exacerbate inequity, specifically in its requirement for young people to access, with some degree of independence, "social, cultural, wellbeing or economic activities" (Scottish Government, 2023c, p. 73) to supplement classroom learning. Inequities in available cultural capital would mean that some pupils (in areas of relative socio-economic advantage) will have readier access to social, cultural, wellbeing or economic opportunities through family or community networks. For Participants 1 and 3, it will be schools' responsibilities to provide these opportunities, whilst resources required (particularly time and staffing) are finite and already-stretched. Servicing this entitlement, may, therefore, require resources to be re-directed, away from supporting other important aspects of provision.

> . . . me having to do that does not sit in line with other schools who don't have to do that, so you've got workload issues with staff, you've got cost implications, and you've got timing implications around the inequity of time being given to all parts of those qualifications. (P2)

**Implications and Recommendations**

Across the post-pandemic Scottish education landscape, residual instability remains, and will occasion exigent issues with which Headteachers must contend. Development of the empowered systems which participants deem necessary for the agentic enactment of proposed transformative change within their own locales is, in participants' views, threatened by public sector resourcing crises. Empowered systems require:

- headteachers' extensive engagement with stakeholders and multi-agency partners (Education Scotland, 2019);
- leading capacity-building and leadership development (Education Scotland, 2018);
- flexibility and autonomy in decision-making related to staffing (Education Scotland, 2018).

It is difficult to envisage the development of such empowered systems whilst resourcing concerns remain.

Recommendation 1:

*A responsive approach to the development of formal professional learning available to aspiring and new headteachers*

A responsive development of headteachers' professional learning could mirror the evolution of role conceptions, particularly if, as per participants' views, headteachers' roles become broader due to potential crisis scenarios such as the pandemic, and local or national resourcing challenges.

*Greater transparency in pre-appointment professional socialisation*

Such transparency could grant aspirant headteachers a clearer understanding of headship's contemporary scope, particularly in its community leadership strand, and the range of roles that must be enacted – "human resources, counsellor, or social worker" (P2). Deeper reflection on the full breadth and implications of the Standard for Headship (GTCS, 2021) could form part of this professional learning.

*Fuller acknowledgement of the significance of post-appointment organisational socialisation*

Professional learning could better recognise the importance of post-appointment organisational socialisation in developing role conception; unless appointed internally, new headteachers only begin this process as they take up post. Currently, in the Into Headship programme, participants rehearse leadership of change through a strategic change initiative led within their own schools, where they are already aware of attendant contextual challenges and available resources; formalised opportunities for senior leader networks ("critical friendships" with other aspirant headteachers or mentoring opportunities) could allow aspirant headteachers to develop awareness of the challenges inherent to varied contexts, and approaches subsequently used by headteachers to deliver contextually-responsive improvement.

*Developing new systems for headteacher networks*

The withdrawal of levers such as Masters-level learning and Regional Improvement Collaboratives is detrimental to new and aspirant teachers, as these encouraged formation of supportive headteacher networks. It may, in lieu of these now-withdrawn structures, be helpful to create more formal and networked systems (at local and national level) for headteacher support and collaboration.

**Recommendation 2:**

*The more systematic engagement of school leaders in planning for the delivery of transformative change at national level*

Thematic alignment in the proposed transformative change agenda is undermined if potential risks and implementation challenges have been inadequately understood. The review *Putting Learners at the Centre,* chaired by Professor Ken Muir (Scottish Government, 2022) responsibly questions appetite for change within a workforce exhausted by maintaining educational provision during and since the pandemic, and accepts the impact this may have on engagement with change. Stobart (2021) offers a sobering reminder of impediments to transformational change in other jurisdictions, highlighting how change must be supported by teachers; already, concerns regarding a top-down approach in Scotland are emerging (TES, 2024b). Campbell and Harris (Scottish Government, 2023b) endorse stakeholder views of "urgent need" of "significant, bold and ambitious reform" (p. 19); one may question how potentially-overwhelming this reform (in its scope, urgency and volume) becomes when juxtaposed with concessions that "the education system and the professionals working in it are stretched with current demands and resource constraints" (p. 24). Not unreasonably, *It's Our Future* (Scottish Government, 2023c) conflates dissatisfaction with current assessment and accreditation approaches with appetite for change, following the significant dissatisfaction caused by certification models used during 2020's lockdown (Scottish Government, 2020) and, to a lesser extent, 2021's Alternative Certification Model (Stobart, 2021, adapted from Deerin, 2021). *It's Our Future*, however, may less wisely conflate appetite for aspirational change of a still-abstract nature, with enthusiasm for specific practical proposals made within the report.

*Headteacher consultation regarding national policy direction and discourse*

At national level, more coherence and certainty could be communicated in policy direction and subsequent discourse, and this could be underpinned by regular and formal consultation with Headteachers, especially those serving potentially-marginalised contexts and communities. Such consultation could grant opportunity for the impact of inequities to be mitigated through more socially-just alternatives.

*Headteacher consultation regarding development of empowered systems required to lead change*

There could be regular and formal opportunities for the broadest possible range of school leaders to engage with a solution-focused discourse - at local and national level - on the development of the empowered systems required to lead transformative change; any timeline to manage the pace of change could prioritise the resolution of resourcing issues impeding both the delivery of the status quo, and the development of the empowered systems required for purposeful engagement with national change at school level.

## Conclusion

Whilst the proposed transformative change required to alleviate pandemic-related inequalities may plot an appropriate course, the journey towards change will be taken by school leaders still

navigating tempestuously unstable role conceptions of headship. To lead such change effectively, role conceptions in transition to headship must be anchored in high-quality and responsive professional learning, specifically by pre- and post-appointment professional and organisational socialisation, and by suitably supportive networks in early headship. If the desired destination is to be reached, the route towards transformative change should be mapped out by a more coherent national policy discourse, and helmed by school leaders working within well-resourced and empowered systems.

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# Self-evaluation for Self and School Improvement: The Development of a Self-Evaluation Strategy Enabling All Staff to Engage with Consistency and Rigour, Bringing a Genuine Basis for Self and School Improvement

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## Abstract

The National Improvement Framework (NIF)[1] (Scottish Government, 2023) sets out a clear vision for Scottish education based on delivering excellence and equity. Two of the six key drivers identified as being critical for ensuring both individual pupil achievement and whole school improvement are the quality of teaching and the quality of leadership in schools. (Mincu, 2015). Through the researcher's personal school experience, backed by an understanding of professional literature (Hopkins, 2001) it is clear that a central factor for sustaining change that genuinely achieves teacher and school improvement is a consistent approach to self-evaluation. Effective self-evaluation is fundamental for both the professional development of individual teachers and the improvement of schools (MacBeath & McGlynn, 2002). Recognising this fundamental element of school excellence and coupled with the clear mandate for all staff to engage in self-evaluation (GTCS, 2021) this article outlines a strategic change initiative (SCI)[2] which sought to develop a strategy to enable all staff to engage in self-evaluation with consistency and rigour, bringing a genuine basis for self and school improvement. At an individual level, critical competence in a teacher's role is being able to scrutinise their own abilities against the requirements outlined in the General Teaching Council Scotland (GTCS) professional standards (2021)[3], making evidence-based judgements on what to develop. To deliver this effectively, self-evaluation needs to be part of a structured framework and established in school practice. Furthermore, assessment needs to lead to action to ensure improvement happens (Stoll, 2009), making evidence-based judgements on how to develop. Overall, development of a structured, timetabled framework for effective self-evaluation provides the basis for meaningful school improvement that delivers for young people.

***Keywords:*** self-evaluation, self-improvement, school improvement, strategic change initiative (SCI), structured framework

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[1] The National Improvement Framework (NIF) summarises the vision and priorities for Scottish education that have been agreed across the system, and the national improvement activity that needs to be undertaken to help deliver those key priorities.

[2] The Strategic Change Initiative (SCI) is the process undertaken by participants of the National Into Headship programme in Scotland to develop strategic leadership for change.

[3] The GTCS Standard for Full Registration is the benchmark of competence required of all registered teachers in Scotland. This Professional Standard encompasses what it is to be a teacher in Scotland.

## Introduction

Scottish education, with an all-graduate intake, clearly defined standards outlined by the professional body (GTCS, 2021) and a robust induction programme for newly qualified teachers, is in a favourable position internationally (Donaldson, 2010) and plays a critical role within Scotland's economic, political and sociocultural landscape (Scottish Government, 2022). Following an unprecedented period of challenging disruptions and restrictions due to Covid 19, teachers and school leaders have demonstrated great creativity and commitment to meet not only the educational needs, but also the increasingly complex and growing physical, social and emotional needs of individual learners, whilst working within the context of an ever-changing national narrative. Recent evidence suggests Scottish attainment continues to fall, and the gap between the most and least socially and economically advantaged continues to grow (OECD, 2021). Whilst holding to the hope that the Scottish Government will respond suitably to the concerns raised in the Organisation for Economic Co-operation and Development that our education system was in urgent need of reform (OECD, 2021), schools must respond to this "once-in-a-generation" opportunity of shaping the vision, purpose and direction of Scottish Education, whilst balancing the need to address the daily challenge of how to effectively deliver the purpose of Curriculum for Excellence; ensuring young people have the knowledge, skills and attributes needed for a successful future (Education Scotland, 2019), in an unpredictable and ever-changing landscape.

As Depute Head Teacher in a medium-sized, urban secondary school in Glasgow with whole school responsibility for self-evaluation and improvement, consideration of how to bridge the aims of the education system to the experience in our classroom was an important aspect of my role as a senior leader. With recognition that the quality of teaching and learning has the biggest impact on pupil outcomes (Bush & Glover, 2014), it is critical to implement systems which intentionally develop teacher capacity, thereby improving our schools. This, together with self-evaluation being recognised as a key requirement for effective school improvement (Education Scotland, 2015), makes a convincing argument for reviewing our self-evaluation strategies to improve outcomes for all.

The GTCS Standards (2021) place a clear mandate on all teachers to engage with self-evaluation:

As a registered teacher …  you are required to:

- use self-evaluation and professional learning to support and improve practice.

- reflect and engage critically in self-evaluation using the relevant professional standard.

- actively engage in professional learning to support school improvement.

(GTCS, 2021, p. 9-11).

This requirement aims to ensure self-evaluation and Career-Long Professional Learning (CLPL) are key elements of a teacher's practice; however, there is no absolute process or approach outlined for how this should be worked out. Whilst there has been a wide and active offer of CLPL across Scotland, through for example Regional Improvement Collaboratives, professional associations and other bodies, as Staff Development Coordinator it became apparent to me that there was a need for a strategic approach to self-evaluation which includes a robust process to deliver self-improvement. The practitioner has a target, but no route-map to achieve this effectively. In contrast, the approach at school level outlined in *How Good Is Our School? (4ᵗʰ ed.)* (HGIOS) (Education Scotland, 2015) suggests excellent schools have robust self-evaluation for improvement approaches to evaluate their practice and intentionally plan for school improvement.

**Literature Review**

The purpose of this strategic change was to create a system that works for individual teachers to support their professional development, but also supports whole school improvement through structured, consistent self-evaluation and directed development. The OECD report (OECD, 2021) recognises teachers in Scotland are not given sufficient time for planning, reviewing and implementing improvements, as well as recommending a streamlining of the vast number of policies and initiatives currently being addressed within the Scottish education system. Within this context of limited time and numerous priorities, it is essential to have a system which supports individuals and schools to use self-evaluation in a structured and meaningful way to ensure improvement. Through personal experience, and discussion with colleagues, it is clear that prioritising self-evaluation, collaborative working and professional learning opportunities is becoming increasingly difficult on top of the day-to-day demands on teachers. However, it is also clear that only by prioritising these three critical areas, is improvement possible. (MacBeath & McGlynn, 2022). For this reason, a structured and focused self-evaluation system, which is embedded across the annual routine of a school, is crucial to identify and implement improvement based on effective evaluation.

At a national level, three fundamental publications, *HGIOS4* (Education Scotland, 2015), *Standard for Full Registration* (GTCS, 2021), and *Achieving Excellence and Equity: National Improvement Framework (NIF) and Improvement Plan* (Scottish Government, 2022), have clearly outlined the regulations and requirements for schools to take responsibility for self-evaluation to deliver improvement. A concern raised in the NIF (Scottish Government, 2022) confirms that there has been either no change or a widening of the attainment gap since the previous NIF published in 2015, across six of the 11 original measures. Perhaps in a bid to address this, the Scottish Attainment Challenge introduced stretch aims in 2022 which has required schools to provide data on key measurements. As an experienced senior leader, it is clear to me that this has resulted in schools requiring a stronger self-evaluative approach to identify aspirational yet achievable targets for raising attainment and closing the poverty related attainment gap (Scottish Government, 2022).

Opinion can be divided over the core purpose of self-evaluation for improvement: an extrinsic regulation of the teaching profession as "a benchmark for professional competency" (GTCS, 2021) or an intrinsic motivator to encourage growth and development through professional learning of practitioners to deliver school improvement (Forde et al., 2015). Perhaps the perceived purpose depends on the lens of the one evaluating and their reason for measuring; for example, a young learner or an HMI inspector. This tension is recognised by MacBeath (2005) in his surmise that whilst school inspection often drives schools and practitioners to engage in self-evaluation, giving schools autonomy for quality assurance distinct from the process of school inspection leads to greater improvement. Fundamentally, it is recognised that these twin drives create ambition and energy which can be harnessed and used purposefully within a school. Within a specific school context there is potential to tailor a self-evaluation agenda to reflect local needs and priorities, however this could be difficult to dovetail with the national inspection regime. Through my experience, when learners' needs are placed at the heart of decision making, school improvement becomes focused on what matters most.

The benefits of excellent teachers are clear and high-quality learning and teaching in the classroom makes the greatest difference to student learning and success (Bush & Glover, 2014). Unless teachers are intentional in planning for and prioritising self-evaluation, in particular due to the challenges for teachers to make sense of and deliver the varied developing priority policy areas in the classroom (Humes & Priestley, 2021), improvement is unlikely (Breakspear & Jones, 2021). Placing teachers at the forefront of decisions identifying areas for improvement encourages them to lead and promote change, increasing the likelihood of improvement (Chapman et al., 2016).

Therefore, ensuring staff are well supported to develop as reflective practitioners will increase their ability to deliver an equitable education to all young people.

School leaders have a responsibility to improve outcomes for young people through increasing staff performance (Mowat & McMahon, 2019) and ultimately improvement for learners should therefore be the central purpose for self-evaluation against the professional standards (OECD, 2015). Using this as an evidence base, schools must develop systems for evaluating current performance to be able to develop teacher capacity in the classroom and leadership at all levels across the school. Although the responsibility for improvement is placed on individual teachers (GTCS, 2021), professional collaboration is an essential aspect of staff development (Hargreaves, 2010). Working collaboratively with others to achieve a common goal through strong relationships, effective communication and learning from each other is essential for driving personal and corporate improvement (Quong & Walker, 2010). Experience has shown that ensuring all staff share a collective understanding of the importance of collaboration to support and challenge one another to improve in order to meet learners' needs, is essential to make a difference in the quality of learning and teaching and the experience for young people.

## Methodology

Kotter (1996) describes the importance of developing a vision showing "how the future will be different from the past" as a critical step in leading change. At the heart of this strategic change initiative was the vision for a better school in every way, achieved through a rigorous self-evaluation strategy as a genuine basis for self and school improvement. To be able to share this target successfully, it was important to develop a sound and secure knowledge and understanding of self-evaluation through extensive reading of national policies and professional literature - GTCS standards, 2021; HGIOS4, 2015; MacBeath & McGlynn, 2002; and Stoll, 2007. It is important to be able to place professional reading within a practical context so meeting with partners, such as the Local Authority Career-Long Professional Learning lead, proved invaluable to deepen understanding of the strategic role of self-evaluation, alongside being made aware of best practice across Glasgow to further enhance knowledge and influence potential change.

With a clear understanding of the purpose of this strategic change and building on established strong relationships with colleagues, establishing a working group with representatives across the school was important to build and grow a vision which inspires the school community. Identifying colleagues who believed in the vision, wanted to be involved and could use their influence across the school to translate the vision into action was essential. The ability to build trusting relationships, communicate effectively and value the contribution of others is essential to leading with credibility and strategic leadership requires the ability to work collaboratively with all stakeholders to achieve a common goal. Enabling staff to do their job most effectively by removing barriers was a key theme within professional literature on improvement (Quong & Walker, 2010) that influenced how to support staff throughout this process. Managing resources such as protecting time for staff collaboration and enabling them to prioritise their role in delivering this strategic change initiative, ensured they felt their contributions were appreciated.

Increasing evidence suggests professional learning which "incorporates collaborative inquiry is an effective process for supporting change and improvement" (Ainscow, 2016, p. 5). The school had recently launched Professional Enquiry working groups, so constructing a group with the directive of developing an approach to self-evaluation for self and school improvement, was an appropriate and beneficial next step. Creating space for colleagues to work collaboratively to share ideas and reflect on experiences rather than working in isolation was important to improve outcomes for young people (Cheminais, 2009). Furthermore, the benefit of ensuring ownership of the vision and methods used, meant teachers were more likely to buy into change when they "own it" (Hargreaves,

2004). The positive impact of involving a wide range of staff in terms of experience and expertise was noticeable, with almost all areas of the school having a "change champion" who could help to overcome potential resistance by sharing their own experiences, answering questions and driving change within their department.

As a Rights Respecting School, pupil voice is embedded across decision making and there is an understanding that increasing pupil voice enables teachers to increase their understanding of how young people learn, thereby improving outcomes for all (Flutter, 2007). An important part of the research stage was focus groups with young people, with the purpose of gaining insight into pupils' understanding of effective learning and teaching. A key aspect the professional enquiry group decided to develop was using pupil feedback for improvement. An online questionnaire with a bank of questions was created for staff to use to gather pupil feedback on the learning context and learning content. This was effective in creating an initial model for delivery and generated feedback from trials in the classroom with staff and young people. More opportunities for pupils and staff to work together not only benefits the specific project, but also improves relationships and ethos across the school.

Ensuring consistent and robust self-evaluation to deliver improvements was a critical element in implementing this strategic change initiative. Departments were asked to provide an evaluative analysis of QI 2.3 Learning, Teaching and Assessment (Education Scotland, 2015) which was a helpful exercise and revealed the need for a more consistent approach to evaluating with an evidence-based approach to ensure triangulation of findings. Using a combination of Mentimeter (an online interactive site to pose questions and gather feedback) and professional discussion, the Middle Leadership Team undertook a session focusing on improving self-evaluation approaches reflecting on key questions; "How are we doing?; How do we know?; What are we going to do now?" (Education Scotland, 2015, p. 9), which enabled rich discussion on evidence to support delivery of self-evaluation.

**Findings and Discussion**

Through the research and design stage, feedback was captured from pupils and staff on how schools can use evidence to triangulate their self-evaluative statements. Middle leaders engaged in discussion around their use of evidence when evaluating against QI 2.3 Learning, Teaching and Assessment and also QI 3.2 Raising Attainment and Achievement. A key finding identified through this work was that in order to engage effectively in self-evaluation middle leaders required robust and consistent guidance. Careful investigation, involving staff, concluded that using a bank of information sources provided a structured basis for objective evaluation that could be repeated with rigour over time. These reference points were used to create a graphic (Figure 1) to support staff with their self-evaluation, acting as a prompt to ensure reflections are triangulated using quantitative data, people's views and direct observation, as outlined in HGIOS4.

**Figure 1**
*Triangulation Evidence - Secondary School Self-Evaluation for Improvement Strategy*
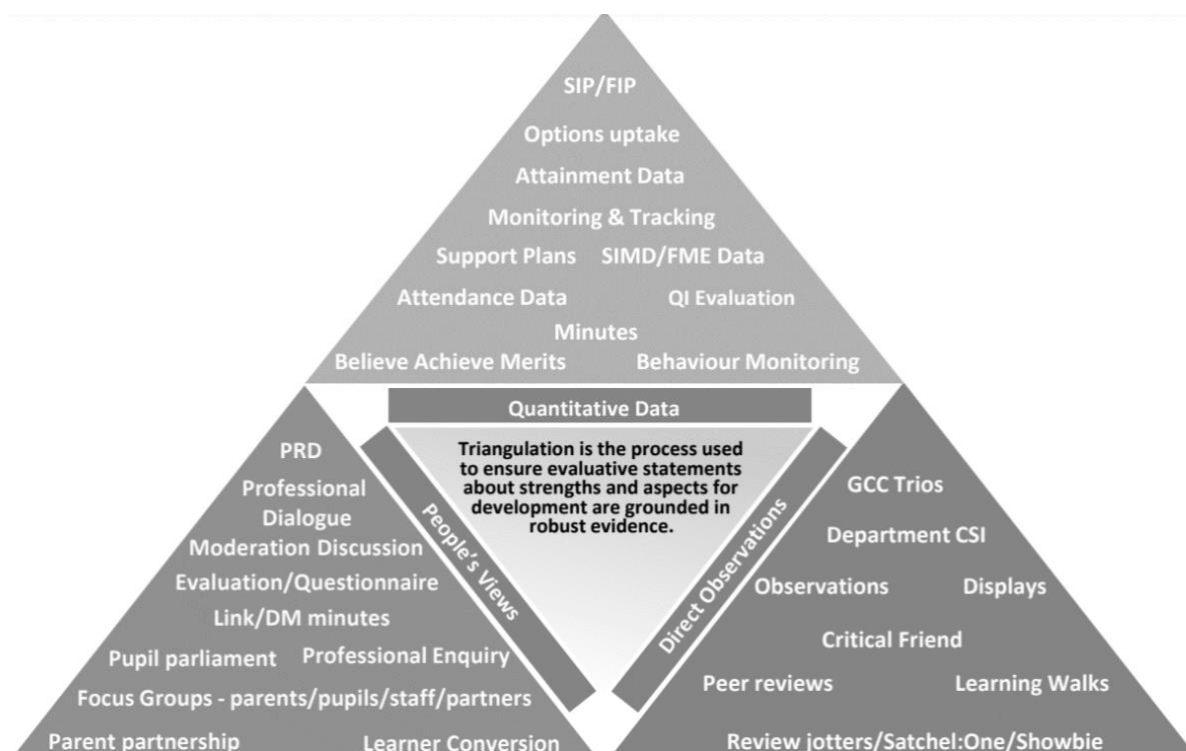


It became apparent that to sustain school improvement across the spectrum of Quality Indicators (HGIOS4) it was necessary to integrate a systematic approach with strong routine. Changing culture is "more important than simply changing structures" (Humes, 2023, p. 25), therefore, reflective practice needs to be embedded within the ethos of the school for it to be meaningful and effective for change. Although everyone who engaged in this topic was enthusiastic, continued effort was difficult to sustain within a busy school environment. Recognising this challenge, a whole school 3-year calendar prioritising a structured approach to self-evaluating the quality indicators provided the strategic process for the school to commit to placing self-evaluation at the heart of improvement. To ensure confidence that key aspects of our school are routinely being evaluated key personnel were identified to lead each QI (Figure 2).

**Figure 2**

*Quality Indicator Evaluation Cycle – Secondary School Self-Evaluation for Improvement Strategy*

**23/24**
- 1.3 Leadership of Change
- 1.5 Management of Resources to Promote Equity
- 2.2 Curriculum
- 3.1 Ensuring Wellbeing, Equality and Inclusion

**24/25**
- 1.1 Self-Evaluation for Self-Improvement
- 1.4 Leadership & Management of Staff
- 2.6 Transitions
- 3.3 Increasing Creativity & Employability

**25/26**
- 1.2 Leadership of Learning
- 2.4 Personalised Support
- 2.5 Family Learning
- 2.7 Partnerships

**Annual Cycle**

- 2.1 Safe Guarding & Child Protection
- 2.3 Learning, Teaching & Assessment
- 3.2 Raising Attainment & Achievement

Improvement processes are often founded on national themes and strategic priorities and these can be hard to translate into department and classroom practice. This work found that it is essential for self-evaluation to be intentionally planned into the day-to-day life of a school to have a significant impact. Breakspear & Jones (2021) and Lucas (2012) discuss the idea that unless teachers deliberately plan and prioritise opportunities for self-evaluation in a structured approach, improvement progress is unlikely. Having had monthly learning walks built into our school calendar for several years, and classroom observations an important part of sharing good practice and developing teacher capacity, there was a firm foundation for embarking on a more rigorous observation model to assess the quality of learning and teaching in the classroom.

A fundamental challenge to effective self-evaluation is a willingness to be open to identify and discuss areas for personal development. In defining the process that recognised this challenge, it was important to provide staff with a comprehensive and objective basis for self-evaluation and also a method that could be applied across the whole school. As part of the school's continued commitment to self-evaluation and based on feedback from staff for a more consistent approach, the Collaborative Self-evaluation for Improvement (CSI) model was developed to validate departmental self-evaluation. CSIs for each department take place during a scheduled week in the school calendar, with the aim of reviewing 6 departments per school year (Table 1). To support collaboration, each CSI involves the Principal Teacher (PT) of the Faculty/Department, Link Depute Head Teacher, Head Teacher, one additional Curricular PT, one Pupil Support PT, one classroom teacher and a group of learners. In advance of the two-day spotlight, a briefing paper is prepared by the PT outlining the departmental areas of strength and areas for improvement. This is introduced to the CSI team and then a series of self-evaluative activities, including learning walks, classroom observations and pupil and staff focus groups, takes place which feeds into a finding report. Following the CSI, an action plan is created by the PT outlining next steps which will be reviewed at

various points across the session through Departmental Improvement Plan review and link meetings in collaboration with the peer PT to also enhance collegiate working.

**Table 1**
*Collaborative Self-evaluation for Improvement (CSI) Calendar - Secondary School Self-Evaluation for Improvement Strategy*

| CSI – Collaborative Self-evaluation for Improvement | |
|---|---|
| 23/24 – Term 1A | Modern Languages, Art & Design |
| 23/24 – Term 1B | Maths, Caledonia Centre (ASN) |
| 23/24 – Term 2/3 | Science, Performing Arts |
| 24/25 – Term 1A | English, Pupil Support/PSE |
| 24/25 – Term 1B | Social Subjects, Design and Technology |
| 24/25 –Term 2/3 | Health and Wellbeing, Business & Computing |

Although in its early days, feedback from those involved in the CSIs to date shows it is evident that building in time for critical reflection against the Quality Indicators is important to ensure evaluative comments are based on robust feedback. This approach is a clear expectation within our School Improvement Plan, backed up by practical resourcing, with time prioritised through the school calendar. Furthermore, the development of the CSI strategy brings confidence that we can support, monitor and review a consistent and robust approach to self-evaluation across the school.

Leading a strategic change initiative requires strength in developing a shared vision and an ability to build capacity in staff to enable them to lead and implement change in a sustainable manner resulting in a positive impact across a school community. Strategic leaders "are futures oriented and have a futures strategy" says Quong & Walker (2010, p. 23), when discussing the seven principles of strategic leadership. It was therefore important that the fundamental purpose of creating a self-evaluation strategy, improving outcomes for learners thereby improving our school, was embedded throughout the research, design and delivery stage of this strategic change. The importance of holding tight to that goal, whilst collaboratively creating a shared vision across the school community to make it happen was critical. Ensuring all staff had a collective understanding of our context was essential to developing a system that makes a tangible difference in the quality of learning and teaching and the experience for our young people.

Learning to lead with drive and determination but balancing that energy with the ability to set, and therefore achieve, realistic targets and moving at a pace appropriate for the school community, was important to bring colleagues on board. Quong and Walker outline a significant principle of strategic

leadership as the capacity to "get things done" (2010, p. 26). Being able to "translate strategy into action" (Davies & Davies, 2004, p. 30) helps to ensure strategic change is sustainable, solidifying the link between theory and practice. Removing barriers, such as protecting time for staff collaboration and building self-evaluation into the Working Time Agreement, supported staff by enabling them to build self-evaluation into their day-to-day job.

Through delivering this strategic change, it became clear that school improvement across all areas necessitates all practitioners to have a genuine desire to improve (Hargreaves & Fullan, 2012), and demonstrate an active and intentional commitment to achieve this improvement. This intrinsic motivator, supported by robust systems and processes, ensures all participants are responsible for improvement across the school. Additionally, recognising the importance of including pupil voice and building in time for collegiate working, creates a culture of whole school community which helps to drive the shared vision for improvement model.

Another important dimension which has been identified as critical to enabling and driving forward sustainable change is the benefit of a strong extended leadership team. Rincón-Gallardo (2023) describes leadership as more than merely navigating change; effective leadership supports and encourages others to work collaboratively in order to generate more ideas and make greater improvements. Hence by establishing a strategy for self-evaluation, leaders at all levels are enabled to support staff collectively to identify the key strengths and improvement areas in both their individual competences and departmental performance.

## Conclusion

Policy governs the teaching profession. As teachers, our role is to translate policy into action, balancing the need to remain true to the national goals and covering the curriculum to prepare learners for qualification assessments, whilst also ensuring we are delivering learning and teaching in a way which is relevant to everyone in our school context. Even within the ever-changing context and challenges we currently face post-Covid, this is not a new requirement, nor an easy one to fulfil – indeed it is over two decades since Paterson (2003) argued that one of the biggest challenges to the Scottish education system is equipping all young people, no matter their circumstances, for both their future role within the workforce, and at the same time, their role as a responsible citizen, able to contribute effectively to the community in which they will live and work.

### Translating Policy into Practice

Although embodying commendable aims, there remains a significant gap between political policy and the teacher experience at the chalk face, for example the tension in the translation of the Learning for Sustainability agenda from theoretical conception to classroom working (Christie et al., 2019). Crucially, deployment of policy into action has to be bridged through a shared understanding of both the thinking behind policy development and the practical reality of day-to-day school life. Improvement plans to address teaching challenges might reach for the stars but they need to be built from the classroom up (Humes, 2022).

### Structured School Framework

Therefore, to support these national goals, a structured system of self-evaluation for self and school improvement is essential. This strategic change initiative has created a manageable approach within the school context, addressing the National Policy Quality Indicators. Through creating a persuasive vision, involving all practitioners in the development of the action steps and implementing a three-year plan, a sustainable basis for school improvement has been designed.

Self-evaluation which is based on triangulated evidence is at the heart of our improvement planning. This enables us to work collaboratively to identify areas of best practice and areas which we recognise through quantitative and qualitative feedback require further focus and attention. This, supported by an ever-growing culture of staff committed to doing their best for young people and a strong extended leadership team, enables us to see continuous improvement.

**Improvement Focused on Young People**

Reflecting on relevant policy and practice, the development of a self-evaluation school strategy was rightly identified as an improvement requirement. This approach goes beyond a box-ticking exercise to meet government regulation as defined in HGIOS4 and the GTCS Standards, but addresses the tangible demand for schools to meet the needs of all learners to improve outcomes for young people. This strategy has enabled us to move forward as a school with a more rigorous approach towards self-evaluation using a comprehensive and structured approach to improvement. The commitment to creating a system designed by staff and young people, which is embedded into our School Improvement Plan, supported by the working time agreement, not only prioritises the importance of self-evaluation but provides an effective mechanism for delivery within the school environment. Ultimately, the implementation of an objective, scheduled system for effective self-evaluation provides the basis for purposeful school improvement which enables the best possible outcomes for young people.

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# Collaboration to Support the Development of Inclusion:
## Reflections on a Strategic Change Initiative

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## Abstract

Including all children in education is one of the biggest challenges facing global systems (Ainscow, 2023).  This paper presents research findings of a strategic change initiative (SCI) that both recognises and addresses the challenges of the inclusion of children with additional support needs (ASN) within the Scottish educational context.  In Scotland, pupils learn in both mainstream and specialist provisions.  Scottish Government (2023a) data shows year on year trends that more children and young people are being identified with ASN.  In the local authority (LA) context presented, data analysis indicates rising referrals and requests from mainstream to specialist provision for pupils with ASN, stressing the challenges of including these learners in mainstream and the dilemmatic nature of placement in learning.  Furthermore, recent financial restraints on education budgets in Scotland (The Scotsman, 2024) create further challenges for the inclusion of pupils, as reported by the Educational Institute for Scotland (EIS, 2019)

This study examines the first year of a three-year SCI led by a depute head teacher (researcher) at a Scottish mainstream primary school with a co-located additional learning needs provision.  The paper outlines how, in the first year of the SCI, within-school collaboration has enhanced ASN learner inclusion across school settings.  Evidence demonstrates that strategic leadership (Johnson, 2013; Quong & Walker, 2010) and practitioner collaboration (Ainscow, 2023; Hargreaves & O'Conner, 2018) have positively impacted learner inclusion and the development of inclusive teaching practices.  In the second year, within-school collaboration will continue with an advancement towards between-school collaboration.  The objective to fully embed both collaboration models will be achieved in the third year.

The findings suggest that the SCI model is both financially viable and scalable and provides school leaders with a framework that can be replicated locally to address current challenges to inclusion in educational settings.

*Keywords:*  inclusion, strategic change initiative (SCI), practitioner collaboration, co-located provision

## Introduction

**The Current Scottish Context**

Scottish Government has produced numerous consultations and discussions on Scottish education over the past few years (Kennedy et al., 2023; Scottish Government, 2020a, 2022, 2023b).  A recent publication, the *Learning Disabilities, Autism and Neurodivergence Bill* consultation (Scottish Government, 2023c), has highlighted many concerns regarding the inclusion of learners with ASN in education. Scottish Government have chosen not to introduce this bill to parliament before the 2026 Holyrood election (Scottish Parliament, 2024).  An increasing number of children in Scotland are identified as having ASN (Scottish Government, 2023a).  Long- and short-term factors constitute an identification of ASN, ranging from life-long conditions such as autism and Down's syndrome to the effects of bullying or being identified as a young carer (Scottish Government, 2016).  In Scotland, although mainstream schooling for all pupils is the basis for inclusive education (Scottish Government, 2019), there has been an increase in the number of children placed in special schools and units – the terminology of *special* is used in policy (Scottish Government, 2019).  At the last data capture in 2023, 7,742 children were learning in special schools (Scottish Government, 2023a). Special schools encompass stand-alone establishments for pupils with ASN and "units or bases" within mainstream schools (Scottish Government, 2019, p18).

Local policies in Glasgow City Council (GCC) deliver Scottish Government policy expectations – that most children should receive their education in mainstream schools within their local communities (GCC, 2016; GCC, 2023).  Policy suggests that inclusion encompasses four essential components: support, presence, participation, and achievement (Scottish Government, 2019, p. 4).  However, analysis indicates that GCC data aligns with national statistics - an increase in the identification of pupils with ASN, many complex, and a rise in the number of pupils enrolled in alternative provisions (GCC, 2024a, p. 6).  Furthermore, in line with local authorities across Scotland, there is a substantial increase in the number of referrals to specialist provisions from education establishments and families (GCC, 2024a, p. 6).  This is a challenge for a sector that is considered a finite resource and is relatively full (GCC, 2024a).  Previous media speculation suggesting financial cuts across LA education budgets in Scotland (Hepburn, 2023) has been actualised.  Education Services in GCC alone require delivering £8.6m million in savings in 2024/25 (GCC, 2024b, p. 15).  Teacher numbers and resources for children with ASN are expected to be impacted and unions have highlighted this as a significant challenge that contributes to practitioner stress (EIS, 2019).

**School Context and Culture**

This research examines a primary school's response to current educational challenges, with a specific focus on the impact on ASN learners.

The pupil population is as follows:

- 311 attend the school, learning over thirteen classes

- 29% live in Scottish Index of Multiple Deprivation (Scottish Government, 2020b) Decile 1 and 2

- 86% belong to ethnic minority groups

- 16% have identified disabilities or health needs

- 74% have English as an Additional Language, recognised as an ASN in Scotland (Scottish Government, 2016)

The school is a Roman Catholic denominational school and most families are of Islamic faith.  There has been a general increase of children attending the school identified with ASN in recent years.  The school is one of only 20 primary schools in GCC that combines a mainstream setting with specialist provision, designated as a *co-located additional learning needs provision*.  Primary one to primary seven pupils are placed over three classes in the co-located provision through local authority (LA) processes.  Historically, pupils in the co-located provision identified with a variety of ASN; the current 22 children are identified with disability and health needs.  This includes conditions such as language or speech disorders, autism spectrum disorder, Down's syndrome, and attention deficit hyperactivity disorder.  Almost all children in the co-located provision are learning at the pre-early or early stages of the Scottish Curriculum for Excellence (Education Scotland, n.d.).

Recent research by LA educational psychologists, based on the work of Florian (2015) found that the school's inclusive practices align with the principles of "education for all" (United Nations Educational, Scientific and Cultural Organization, 1994).  Findings indicate strong advocacy for the inclusion of all children among stakeholders across the school community, which is essential for fostering an inclusive approach. Additionally, the co-located provision was identified as a valuable resource that enhances inclusive practices throughout the school. Despite these positive insights, the senior leadership team's self-evaluation process identified key areas where inclusive practices could be elevated from *very good* to *excellent.* Data underscored the need for further analysis of the inclusion of children from the co-located provision accessing the mainstream setting for learning experiences.  This had decreased in recent years as shown in Table 1.

**Table 1**
*Comparison of Children Accessing Mainstream from Co-located Provision (2018 vs. 2022)*

| Year | Total Number of Children | Number Accessing Mainstream | Percentage Accessing Mainstream |
|------|--------------------------|-----------------------------|----------------------------------|
| 2018 | 13 | 7 | 53.8% |
| 2022 | 21 | 5 | 23.8% |

This trend aligns with statistics in Scotland, showing a steady increase since 2007 in the number of children attending special schools without access to mainstream provision (Scottish Government, 2023a).  Further evaluation of HGIOS Quality Indicator 2.4 (Education Scotland, 2015) assessed practitioners' confidence in providing personalised supports for learners.  As shown in Table 2, these evaluations identified the rise in ASN and the need for one-to-one support for several pupils across the school as challenges for inclusive teaching.

**Table 2**
*Teaching Staff Comments on Meeting the Needs of Diverse Learners*

| Comments |
| --- |
| *Staff meet the needs of children and differentiate very well in terms of poverty, family history, health, etc., however, some work is needed on ALN.* |
| *The needs in some classes are so diverse that it is impossible to be offering challenge and support to all children at all times when you have children who need 1:1 support.* |
| *The work is certainly planned to be varied and active, and differentiated, but we have such a variety of individual needs within a class that it is difficult to say if we are getting it right 100% of the time and for everyone.  We thought that this is also linked to the amount of support available to teachers as so many children now seem to need individual support from a Support for Learning Worker (SFLW).* |
| *We try to do our best on a day-to-day basis.  We plan to present our learners with variation, differentiation, activity, support, and challenge using the support staff allocated to us.  However, it is really difficult to ensure it's happening all of the time—particularly in classes where needs are already quite diverse.* |

Based on these evaluations and school data, the senior leadership team identified two key areas for improvement:

1. Addressing the inclusion of ASN learners from the co-located provision in the mainstream setting.

2. Strengthening the supports and strategies available to mainstream teaching staff to meet diverse learner needs.

## Literature Review

Prior to leading the SCI, the researcher conducted a literature review to address the school's development needs, critically examining the dichotomy between mainstream and specialised placements for pupils.  In anticipation of cross-departmental work, the researcher also explored the role of collaboration in fostering inclusive practices.  Additionally, Scotland's local and national policies on placement and collaboration were reviewed to establish the political context.

### Dilemma of Difference

Decisions around placing learners in mainstream or specialist provision are complex and widely debated (Ainscow, 2024; Norwich, 2010; Warnock, 2010), with approaches varying internationally

(Hatch, 2022).  Regarding placement in learning, Norwich's (2010) interpretation of Minow's (1990) "dilemma of difference" is a relevant theoretical concept to consider.  Norwich (2010) maintained that specialist placements create better access to resources for learners, however, can cause a feeling of exclusion from peers.  Conversely, mainstream settings may foster a sense of inclusion but may lack specific supports for some learners.  Ensuring their child's individual needs are met in special provision versus their equal rights in mainstream schools is a dilemmatic decision for many families (Ainscow, 2024).

In Portugal, the curriculum and provision have been expanded to facilitate mainstream schooling for learners with disabilities, with 98.9% of students with ASN enrolled in mainstream schools (Alves & Fernandez, 2023).  The Organisation for Economic Co-operation and Development (2022) highlights two main strengths of this approach: (1) the substantial resources allocated to support children within mainstream settings, and (2) the collaborative efforts and school networks that promote inclusive practices (Alves & Fernandes, 2022).

**Practitioner Collaboration**

Chapman and Ainscow (2019) maintain the importance of collaboration and describe it as a means for fostering the development of inclusion and inclusive pedagogies - removing obstacles that prevent learners from learning (Mittler, 2012).  According to Ainscow (2023a), within-school collaboration can challenge preconceived beliefs about learners' abilities and allows sharing of practices that encourage approaches to engage pupils.  Fundamentally, this promotes a more inclusive environment.  Collaboration within a school setting can also assist in determining the most suitable learning environment for a child (Ainscow, 2023a).

Between-school collaboration – practitioners collaborating across different schools - can significantly enhance the ability to meet diverse learner needs.  It is suggested that this approach is beneficial for pupils who are often marginalised and those whose academia raises concerns (Ainscow, 2023a).  The Organisation for Economic Co-operation and Development (OECD) (2015) have suggested that between-school collaboration could drive system-wide improvements in Scotland. The literature reveals ongoing debate around inclusion, with research highlighting both the challenges and potential of mainstreaming for learners with ASN.  Collaboration, both within and between schools, is positioned as a powerful strategy for fostering inclusive practices and addressing the diverse needs of learners.

## Findings and Discussion

The following outlines how the literature review coupled with diverse data evidence guided the researcher in leading the first year of the SCI.  The implementation of the SCI focused on two key objectives:

1. Addressing the inclusion of ASN learners from the co-located provision in the mainstream setting.

2. Strengthening the supports and strategies available to mainstream teaching staff to meet diverse learner needs.

An analysis using Kotter's stages will provide a comprehensive examination of the developments of year one of the SCI. Figure 1 displays Kotter's "Eight-step Process in Leading Change" (1996).  The process supported the change development and was utilised to design and implement the SCI in the school establishment.

**Figure 1**
*Process in Leading Year One of the SCI*



**Establish a sense of urgency**
*Aug-Sep*
Share school, Scottish Government and Local Authority data with teaching staff

**Create a change vision**
*Sep-Oct*
Plan SCI as a staff team

**Creating a guiding coalition**
*Sep-Oct*
Create a working party

**Communicating the change vision**
*Oct*
School Improvement Plan shared with timescales and personnel

**Empower Action**
*Oct-June*
Research to assess barriers
Staff supported to overcome these

**Create short-term wins and consolidate improvements**
*Apr-Jun*
Evaluation and assessment of SCI

**Anchor to the change: sustainability and next steps**
*Jun*
Analysis of SCI prior to planning and implementation of year 2

**Establish a Sense of Urgency**

Kotter (1996) proposed that urgency levels be raised to promote change.  As part of the effort to drive change within the school establishment, the researcher and senior leadership team shared data with teaching staff.  This included:

- Comparison of children accessing mainstream from co-located provision data (Table 1)
- Evaluations of HGIOS Quality Indicator 2.4 - Personalised Support (Table 2)
- Trends that show an increase in pupils identified with ASN locally and nationally

Based on this information, the two key objectives to address inclusion in the school were shared with staff:

1. Addressing the inclusion of ASN learners from the co-located provision in the mainstream setting.

2. Strengthening the supports and strategies available to mainstream teaching staff to meet diverse learner needs.

According to Rincón-Gallardo (2020), effective action requires a combination of efficacy, willingness, and capacity to impact learners positively.  Evidence suggested that staff in this establishment possess both the confidence and enthusiasm to make a positive impact on pupils.  Indeed, the researcher anticipated a committed response to the objectives of the SCI.  Providing capacity for practitioners to drive change would rest on the school's senior leaders.

**Create a Change Vision**

Practitioners were consulted in the initial planning stages of the SCI.  The researcher accepted that staff must work together to create a shared understanding of the vision and need for change to avoid the risk of opposition (Zenger & Folkman, 2016). Therefore, to address the identified challenges and key areas, teaching staff were asked to rank which supports would be most beneficial in fostering the inclusion of learners.  Practitioners average ranking from first choice to last choice were:

1. Collaboration with co-located provision staff
2. Training on specific needs
3. Training on planning for pupils with ASN
4. Training on an inclusive environment
5. Additional staffing
6. Meetings with SLT
7. Training on tracking pupils with ASN
8. Additional resources

The researcher noted the low ranking of additional staffing and resources to support inclusion. Given the current climate of budget cuts and staffing reductions in education, practitioners may have recognised these supports as unattainable. Table 3 below provides some additional comments from teaching staff.

**Table 3**
*Teaching Staff Comments on Strategies to Support the Inclusion of Pupils*

| Comment |
| --- |
| Collaboration with the provision staff is vital in my opinion.  This can improve the rest of the supports and should be carried out before looking at the other supports. |
| Working closely with all staff is key to the success of inclusion in any environment. |

> I find it valuable to learn from someone else and listen to their experiences.

> The provision/DHT have a wealth of knowledge to tap into.  I would ask the teacher for what works strategies and the DHT for pastoral support.  So, my first port of call will be to talk to them first.  Then I would improve my skills, knowledge, and confidence on the diagnosis by attending training on their specific needs.

> I believe the best way to learn as a professional is to work alongside experts in a given area. Close collegiate interactions around pupils moving between mainstream and enhanced provision is key to getting it right for the learners.  While training is important, I believe it sits under learning from colleagues.

In recognition that within-school collaboration can challenge views about learners' abilities and the importance of staff sharing their own expertise (Ainscow, 2023a) the researcher, with senior leadership colleagues, agreed that formalised collaboration of teaching staff could be an effective means to support inclusion in the establishment.  Collaboration could address both objectives - the inclusion in mainstream for children who learn in the co-located provision, and the development of supports and strategies. The researcher also recognised the potential impact of collaboration with other schools on promoting inclusion.  Indeed, LA policy advocates for this, suggesting staff with specialist skills support colleagues across the city (GCC, 2016).

**Creating a Guiding Coalition**

"People Wisdom" (Davies & Davies, 2006) supports effective leadership when school leaders know their team and who can effect change.  The researcher has worked in the school community for ten years, has developed a strong understanding of colleagues' skills and drivers for change, and recognises that the cultivation of these furthers school developments.  In the research school, senior leaders acknowledge that they determine the demonstration of leadership and maintain distributed leadership as a style that has supported change (Day et al., 2007; Iandoli & Zollo, 2007).  Staff across the school do adopt various leadership roles and responsibilities, and effective leadership of change was evidenced in the school's HMIE findings.

A working group was therefore established, comprising staff members with the interest and skills to support the objectives of the SCI.  The working party included the depute head teacher (DHT) (researcher), principal teacher (PT), and mainstream and provision class teachers. During the planning of the SCI, evaluations evidenced that mainstream practitioners viewed co-located practitioners as more skilled to support children with ASN.  Kerins (2013) research does suggest that mainstream systems credit staff in specialist provisions as more skilled in meeting the needs of children with ASN.  The working party recognised this as a challenge to overcome and agreed that there would be limited impact in collaborating across mainstream and co-located provision if mainstream practitioners did not also identify their own skillset and capabilities.  It was agreed that the SCI developments should ensure all staff receive support in demonstrating their capacity and capability in supporting ASN learners.

**Communicating the Change Vision**

The researcher communicated the change vision to the teaching staff through the School Improvement Plan (SIP), created with the working party. To clearly articulate the plan, the involved

personnel, timelines, and methods for evidencing impact were outlined.  The SIP detailed how the key priorities would be achieved:

**Year 1: Within-school collaboration**

- Inclusion meetings with relevant teaching staff would enable a discussion of the inclusion of pupils from the co-located provision into the mainstream setting.  Staff would collaboratively develop personalised targets for each pupil, identify required resources, and establish methods for monitoring progress.
- Case study spotlights, led by teaching staff from both mainstream and co-located provision, would focus on specific strategies to support pupils.  These spotlight sessions would allow staff to collaborate, share practical approaches, foster the inclusion of learners with ASN and build their own capabilities and capacity.

**Year 2: Between-school collaboration**

- Working collaboratively with other schools would allow observation opportunities across, resource sharing, and professional dialogue with colleagues.

**Empower Action**

Formal and informal dialogue with staff revealed that almost all were empowered to develop inclusion and were encouraged by the collaboration element of the SCI.  To further empower action the researcher accepted that barriers to the SCI's developments had to be removed. Time and capacity for staff were identified as a significant barrier for practitioners (EIS, 2019).  Teachers in Scotland are face-to-face with pupils more than in most other countries in the OECD (2021).  To combat this, the Scottish National Party's manifesto (2021, p. 4) declared their intention to "…recruit 3,500 additional teachers and classroom assistants, allowing teachers more time out of the classroom to prepare lessons and improve their skills", if they should win the election and be elected to government.

However, a recent report has advised Scottish Government not to proceed with targets for increasing teacher numbers to allow class contact time to be reduced to 21 hours (Scottish Government, 2024).

The researcher and senior leaders accepted that time for practitioners to partake in inclusion meetings and develop case studies was a priority.  Ainscow and Messiou (2018, p. 26) are of the view that "time is the currency used within schools to determine what is important".  Strategic decisions to release teaching staff from class-commitments were made to evidence the importance of the SCI. The outcome being senior leaders covering classes.  Hargreaves (1994) maintains this practice is prevalent in schools with collaborative cultures.  The researcher recognised that fostering collaboration among teaching staff would necessitate an initial increase in senior leaders' workload. However, moral leadership—defined by MacBeath (2003) as adhering to what is right—played a crucial role in the senior leadership team's drive to further efforts to support pupils' inclusion. Mitigating time constraints significantly empowered action to allow mainstream and co-located teaching staff to achieve the priorities presented in the SIP.

**Create Short-term Wins and Consolidate Improvements**

Positive outcomes towards the priorities of the SCI were achieved through strategic actions and collaborative efforts.  The following examples illustrate how the SCI promoted effective practices, enhanced staff capabilities, and improved inclusion for ASN learners.

***Increasing Pupil Mainstream Inclusion***: Collaboration between a mainstream P1 teacher and a teacher from the co-located provision produced a positive outcome for a learner. Practitioners met, during the ring-fenced time, to discuss the mainstream inclusion of a child from the co-located provision with Down's syndrome.  Dialogue around this child's needs concluded that planning a weekly 30-minute health and wellbeing session in the mainstream P1 class would support their inclusion. SMART targets, created collaboratively, focused on fostering peer relationships. Both teachers assessed the experience as beneficial to the child, noting an increase in the child's socialisation and development of a friendship.

Positive feedback was received regarding the inclusion meetings focused on including children from the co-located provision into mainstream classes, primarily due to the allocated time for these discussions to take place. Inclusion meetings were observed across the staff team as an effective way to include pupils from the co-located provision in the mainstream setting.

***Building Practitioner Confidence***: One instance highlighting the importance of positive relationships in the SCI's development involved a mainstream staff member who initially felt reluctant but was encouraged to present a case study to the entire team.  The case study focused on a pupil with sensory sensitivities, detailing adjustments such as a standing desk, sensory toys, and access to safe spaces when needed.  The insights from this case study proved beneficial across the teaching team, and the presenting staff member acknowledged a newfound confidence in their abilities afterwards.

All staff rated sharing case studies as highly beneficial to their practice. The sharing of learning strategies from teaching staff through case study spotlights was seen to help colleagues enhance practices and better include learners. A teacher commented that learning about real-life scenarios from colleagues allowed them to implement new strategies with their own pupils.

Findings from a LA quality assurance review—conducted by Quality Improvement Officers, LA Inclusion Team members, Educational Psychologists, Headteachers, and DHTs—provided the researcher with a robust evaluation and consolidation of the SCI's improvements. Using HGIOS 4 Quality Indicators (Education Scotland, 2015), the LA review produced a positive evaluation of the school's practices and the SCI's impact.  In conjunction with the LA review report and the school's evaluations of the SCI and quality assurance processes, the researcher evaluated the first year of the SCI, concluding that:

- A systemic and responsive approach was being taken to support all pupils in being supported, present, participating, and achieving.

- Inclusion meetings supported staff to have strong professional dialogue around ASN.

- Case study spotlights created capacity and capability building of staff across the school and supported the inclusion of learners with ASN.

- Prioritising time to collaborate led to empowered action from practitioners.

- The number of children in the co-located provision who could effectively access mainstream learning increased from five to seven.

- For children in the co-located provision who were not participating in mainstream learning, collaboration of practitioners determined that this was appropriate.

- The researcher observed a general increase in collaborative working relationships between practitioner colleagues in the form of spontaneous and voluntary collaboration.

**Anchor to the Change: Sustainability and Next Steps**

The sustainability of the SCI was tested during the school year as the DHT and researcher leading the initiative moved to a short-term seconded post in another school.  The effectiveness of the distributed leadership embedded in the school was positively observed.  The school's working party, willing to achieve the SCI's priorities, supported the continuation of the developments without the presence of the DHT.  Through formal dialogue, emails, phone calls and unplanned coffee shop meetings, the team created a plan detailing next steps to ensure the SCI's sustainability in the absence of the DHT.  This further cemented the presence of the school's collaborative culture, where a lack of hierarchical systems has allowed for a bottom-up model where staff involved are self-led (Hargreaves, 1994).  This practice aligns with GCC Education Services' promotion of an education system where all staff have collective agency (GCC, 2024b).

In year one of the SCI, there was some success in supporting other schools with inclusive practices by sharing resources and professional dialogue through the LA outreach model.  There was also evidence of the impact on self-perception and practice for the teachers who took part in working with other schools (Muijs et al., 2011).  However, Ainscow (2023a) discusses successful between-school collaboration visits that allow for mutual learning among hosts and visitors.  As the SCI advances towards authentic between-school collaboration in the second year of the SCI, it will be imperative for school leaders to facilitate an exchange of knowledge rather than merely focusing on dissemination.  The DHT's secondment to a different school has opened opportunities for between-school collaboration.  Plans are being made for the DHT and PT to work together to develop this.

Although teaching staff have been heavily involved in the SCI, the researcher has reflected on whose voices were heard in creating and implementing the SCI thus far.  Harris (2009) proposes that all stakeholders participate in school development; otherwise, change will not be sustained.  Looking forward to year two of the SCI, an identified next step is gathering more views from all stakeholders around the developments.

## Conclusion and Recommendations

The growing lack of trust that mainstream education does not meet the needs of many ASN learners' needs calls for reflection from all education stakeholders in Scotland (Educational Institute of Scotland, 2023).  Decision-makers must examine the barriers to inclusion and how they can be addressed with the available resources and skills (Chapman & Ainscow, 2019).

This study supports collaboration as one effective means to address these challenges and develop better inclusion within school settings.  Through strategic leadership that promotes a clear vision for inclusion and prioritises collaboration, leaders have empowered staff within the research school to develop skills to support ASN learners effectively.

The dilemma in placement, which is complex, is observed in the school.  Placement decisions may conclude that meaningful inclusion for certain pupils does not necessitate mainstream access but is better achieved within the co-located provision. Practitioners appear to recognise this complexity, and it is an on-going discussion.  Collaboration between practitioners in a school with both mainstream and co-located provision has enabled flexible and successful inclusion for some ASN learners.

A leadership focus on fostering a collaborative culture has enabled sustainable, scalable practices. Additionally, given the constraints on educational budgets (GCC, 2024a), the SCI model is financially viable, achieved by utilising existing staff and resources, building capability and capacity to share expertise. While the collaboration practices presented here can be adopted by other educational establishments, it is acknowledged that adaptations may be necessary for schools with different contexts.

Following Kotter's process guided the SCI developments, and the researcher would recommend adopting and adapting this process when leading change. However, the researcher recognised that leading change is more than processes and plans; it is also about supporting staff to be invested (Arar & Oplatka, 2022). Mobilising heads, hearts and hands (Rincón-Gallardo, 2023) was essential to leading the change.

The following recommendations outline actionable steps for implementing the SCI model.

School Leaders:

- Adopt Kotter's process to plan strategic change initiatives

- Nurture the expertise of practitioners to support the development of change

- Allocate time and resources to allow for collaboration

Policymakers:

- Enable schools to share resources and best practices for learners

- Ensure that professional development programmes emphasise the importance of strategic leadership in fostering inclusive education

- Explore collaborative initiatives as a means to reduce referrals to specialist provision

Future Research:

- The SCI is designed as a phased initiative, with future research planned over a further two years

- Explore the implementation of the SCI model in schools across different contexts to assess its adaptability

- Investigate the perspectives of ASN learners, their families, and support staff to gain a comprehensive understanding of the SCI model's impact

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# Reviews of
## *Journal of Leadership, Scholarship and Praxis in Education*

### A valuable new resource for all education leaders

The *Journal of Leadership, Scholarship and Praxis in Education*, the new education research journal in partnership between School of Education, University of Glasgow and Education Services, Glasgow City Council is a valuable new resource for all education leaders. This journal is an opportunity to hear the voices of practitioners and gain insight into the current leadership issues and developments impacting on schools.

Learning is the core business of all schools and the focus for all leaders in schools. As school leaders, at all levels, learning is at the heart of what we do and how we behave. With the *Journal of Leadership, Scholarship and Praxis in Education* we now have an accessible and authentic resource to support our professional learning which is relevant, timeous and useful, whatever our context or setting.

This journal presents thinking and research on aspects of leadership which all leaders in schools and educational settings will find familiar. As a headteacher it is helpful and refreshing to read research which has been led by practitioners. Reading the research and lived experiences of people who are currently in post, and who bring the lens of experience to their enquiry, creates a connection and a sense of possibility which is helpful when considering or leading change. This kind of practitioner enquiry, with literature reviews which support and extend thinking, helps to develop practice, gain insight, develop thinking and consider how we might approach current challenges and dilemmas from new perspectives.

The research presented adds to our knowledge base and provides further resource for developing practice, improving outcomes for young people and improving our schools. It is my hope that this new journal becomes a go-to source of ideas and research to inform our professional learning as we contribute to developing our school and systems leadership.

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Seonaidh Black has been a headteacher in Glasgow for seven years. She has had a career-long interest in professional learning and leadership development and was part of the first cohorts of the Into Headship and In Headship programmes at the University of Glasgow's School of Education. She is currently part of the design group leading Glasgow City Council's Headteacher Mentoring programme and she frequently contributes to school leadership development in Glasgow and beyond.

**Explorations of curriculum, transitions, inclusion, equity, achievement, self-evaluation and much more**

It is wonderful to see this first edition of the *Journal of Leadership, Scholarship and Praxis in Education* published – testament to the vibrant, rich partnership between Glasgow City Council and the University of Glasgow. This kind of collaboration, between stakeholders with different responsibilities and perspectives, is exactly the kind of work that has the potential to effect transformative change in the system. As Joint Directors for the Centre for Transformative Change in Schools (CenTCS) here at the University of Glasgow we have a particular interest in supporting, facilitating, researching and understanding how research-practice partnerships work to best effect transformative change for the wider system and, crucially, for the young people who are served by that system.

This inaugural issue of the *Journal of Leadership, Scholarship and Praxis in Education* illustrates the range of areas that teachers and school leaders seek to find out more about in order to better serve the young people in their care. It takes us through explorations of curriculum, transitions, inclusion, equity, achievement, self-evaluation and much more. The studies reported here tackle some of the most pressing issues in schools today, in the urban setting of Scotland's biggest city. While the articles are, therefore, deeply contextual in terms of the Glasgow schools from which the 'problems of practice' arise, it is clear to see the relevance of the articles for the wider profession both within and beyond Scotland.

What strikes us in reading this collection of work is that the *Journal of Leadership, Scholarship and Praxis in Education* provides an outlet for high quality teaching-focused inquiry to be distributed to a wider audience.  Difficulties related to sharing educators' learning across different organizational boundaries, it seems to us, has been a long-standing challenge for the education system. The *Journal of Leadership, Scholarship and Praxis in Education* plays a role in addressing this challenge by providing an avenue for teaching-focused studies not only to make a difference within the contexts in which they were carried out, but also to allow for the cumulative learning across studies to be captured and shared more widely.

We offer our congratulations to the authors who have published in this issue and thank them for being willing to make their work public. They demonstrate for colleagues throughout our partnership and beyond how to offer rigorously conducted and highly relevant teaching-focused research to a broader audience.   We deeply value the spirit of collaborative commitment, evident in this inaugural issue, to making a positive difference for children and young people, and we look forward to the journal's continued role in shaping and furthering the research-practice partnership between the University of Glasgow School of Education and Glasgow City Council.
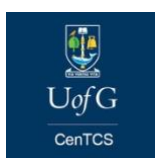
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Professor Aileen Kennedy joined the University of Glasgow School of Education in October 2023, having previously worked at the Universities of Strathclyde and Edinburgh in Scotland. Prior to entering academia, she worked as a Primary School Teacher and as a Professional Officer with the General Teaching Council for Scotland.

Her work centres on teacher professional learning and teacher education policy and is shaped by a values-based commitment to enhancing the quality of teaching in schools, for social good. She is committed to social justice and has a clear vision of the teacher as professional activist, capable of supporting transformative learning for their pupils and themself.

She is Co-Managing Editor of Professional Development in Education, a Universities Scotland Nominee on the General Teaching Council for Scotland, and a member of the International Teacher Education Collective (@_ITERC). Recently, she became one of the two Directors of the Centre for Transformative Change in Schools (CenTCS) at the University of Glasgow School of Education.

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Brianna L. Kennedy is Professor of Education and Joint Director of the Centre for Transformative Change in Schools (CenTCS).
Professor Kennedy came to academia after teaching middle school for the Los Angeles Unified School District in California, where she faced the daily challenge of meeting the needs of a mostly immigrant population of students who were not being well served by the policies, processes, and practices of schooling. She completed her PhD at the University of Southern California where she learned to rigorously examine how teachers could meet the needs of marginalized students. She then served on the faculties of the University of Florida and Utrecht University, where she prepared teachers, facilitated educators' engagement in improving professional practice, and taught in bachelor, master, and doctoral programs. Her personal website contains more information about her work.

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