INTRODUCTION

Two recent influences on the development of school learning environments in New Zealand have been the Christchurch earthquakes and the New Zealand Ministry of Education's ten-year property strategy.

Following the 2011 Christchurch earthquakes, the New Zealand government embarked on an ambitious plan to regenerate 115 schools with an overall investment exceeding NZ$1.1 billion. One of the opportunities provided by the Greater Christchurch Renewal programme was that of rebuilding the schools, not as they were before the quakes, but as ‘Innovative Learning Environments’ (ILEs) – also variously described as open, flexible, collaborative or new generation learning environments.

Simultaneous to the reconstruction and remodelling of the Christchurch education network, the New Zealand Ministry of Education has been prioritising the construction of innovative learning environments to ensure school property is ‘fit for purpose’. The building of ILEs will continue to be a high priority over the coming years, with the Ministry’s policy being that if schools lack “the range and quality of teaching spaces needed to support educational outcomes, they will need to upgrade these spaces before they undertake other projects” (2011, p. 13). One of the key challenges presented by both the Christchurch rebuild and the Ministry’s 10-year property strategy is transitioning the teaching workforce from working primarily in industrial-era classroom spaces into new, open, flexible, collaborative ILEs.

This paper describes the approach – methodology and methods – being taken by the author to researching the process of school leaders leading the implementation of innovative learning environments in these schools, with a particular focus on change leadership.

KEYWORDS: INNOVATIVE LEARNING ENVIRONMENTS, INNOVATIVE EDUCATION PRACTICES, EXPERT ELICITATION, SITUATION PROFILE, CLUSTER ANALYSIS, EVALUATION.
POSITIONING THE RESEARCHER

It is against this backdrop that I go about my work. My day job involves working for an educational not-for-profit organisation as a consultant/facilitator in schools, helping them to implement innovative learning environments. I first began exploring the nature of change within learning environments as a newly-appointed Deputy Principal of a new senior high school in Auckland, New Zealand. We worked with architects on the design, engaged the community, appointed the staff, developed approaches to curriculum, pedagogy, assessment and culture – and preparing people for the transition from traditional schooling to something different.

Essentially, the question facing those implementing innovative learning environments is, 'If our built environments are changing, how do we best support people through the process of changing their practices to make the most of these new opportunities?'

The practices that may elicit change include (but are not limited to) ongoing training and professional learning, as-well-as updates to organisational culture, methods of evaluation, relationships, curriculum configurations and pedagogical practices.

LITERATURE REVIEW

Blackmore, Bateman, Loughlin, O’Mara and Aranda (2011) indicated that the research literature surrounding innovative learning environments revolves around the design phase, with little attention paid to “the organisational cultures and leadership that facilitate or impede innovative pedagogies in new spaces” (2011, p. 5). Supporting this assertion, journal and database searches using phrases like ‘change’, ‘change leadership’ and ‘change management’ combined with ‘learning environments’, ‘new generation learning environments’ and ‘innovative learning environments’ turn up no relevant studies. Consequently, while some of the change leadership literature explored in this paper comes from within education, there is a wealth of relevant literature from other fields that is highly informative.

With respect to change leadership and its influence on the success of innovative learning environments, there are a number of assumptions that need to be tested. Researchers like Robinson, Hohepa and Lloyd (2009) have provided comprehensive evidence about the best way to lead existing schools successfully. Robinson et al. (2009) cite characteristics such as clear vision and goals, coherent systemic structures and the strategic allocation of resources as key to successful leadership strategies. However, most of these studies focus on leadership processes designed to maximise the effectiveness of the status quo and engagement in incremental, low-level improvement. It appears that when schools engage in dramatic changes such as implementing ILEs, something different is required. Heifetz, Grashow and Linsky (2009) posit that such dramatic changes can disrupt cooperation, a sense of well-being, and social cohesion. Furthermore, it may confront group identities, change working relationships, challenge expertise and throw people into stages of ‘conscious incompetence’. Indeed, research suggests that little is known about how best to support profound adaptive change.

As a result of my review of the change leadership literature some assumptions emerged that needed to be tested, particularly because much of this literature came from sources outside of education. Looking across the literature, I have begun to develop a three-phase theoretical framework for change leadership based on the assumptions being tested. Figure 1, below, illustrates this framework for proposed ‘persistent principles of change’.
The ‘persistent principles of change’, illustrated above, are important throughout the entire change process. For instance, in the preparing for change phase, change readiness assumes critical importance, but as the change progresses, it recedes further into the background. Similarly, sense-giving, sense-making and knowledge building appear to be particularly important in the implementation phase, however these assumptions need further validation, leading to my PhD research question:

What leadership practices are most likely to lead to the successful implementation of an innovative learning environment (ILE) and associated practices?

METHOD

RESEARCH DESIGN

A central methodological challenge associated with this research is my position within the project’s context and communities under observation. My employment requires me to work with school leaders to help them successfully implement ‘innovative learning environments’. Thus, I’m enacting dual roles within my project, as both researcher and research participant. In these roles, I’m trying to both shift practice, while at the same time attempting to analyse the ways in which we might best implement changes in practice.

These dual roles present significant challenges to objectivity in the research process, partly because the relationship between consultant (me) and school leader is based on an understanding that the consultant is there to make changes throughout the process: to act as an instigator and catalyst. In essence, my job is to jump into the school context and muddy the waters. It’s what I’m paid to do. My work is to help school leaders “organise flux” (Weick, Sutcliffe & Obstfeld, 2005, p. 411) across many levels. This involved trying to:

- Help school leaders make sense of their own jobs. Resolving questions such as, ‘In what ways is this type of work congruent with conventional models of school leadership and in what ways is it a departure from them?’
- Help school leaders make sense of the situation they find themselves in, which is often complex, emergent, dynamic and unbounded. Identifying and putting in place the enablers and support mechanisms that all parties need.
• Draw lessons out of one context and apply them sensitively in another i.e. taking ‘success’ or ‘failure’ and identifying antecedents (noticing, bracketing, communicating).

There is considerable alignment between my day job and my research interests. Both are attempting to support others by producing “meaningful, accessible, and evocative research grounded in personal experience” (Ellis, Adams & Bochner, 2011, p.1).

Several potential methodological challenges arise out of this context:

• ‘Objective’ approaches to research clearly do not fit this context. The idea of me as a ‘knowledgeable outsider’ entering the research context, dispassionately observing cultural members, then leaving to write about the culture feels like a betrayal, if not exploitation.

• The nature of my personal relationships with the research participants is critical to the project. I know them well and they know me. In this context we are emotionally and professionally entwined – joint authors of the narrative.

• The commercial arrangement between my organisation and the school leaders alongside whom I work is also important. To attempt to be impartial in the research process, to stand back and to be a fly on the wall, would jeopardise not only my professional position, but also those of the school leaders with whom I work.

These challenges have contributed to my growing sense of unease about playing the role of what Struthers (2012) refers to as a “silent author” (p. 68). I am an observer of, and a participant within, the research context. I am both gazed upon and the gazer. My preference is not to ignore self, but to use self to break my silence and to analyse and help others understand these cultural experiences from a personal perspective.

AUTOETHNOGRAPHY

Ellis et al. (2011) characterise autoethnographers as researchers who “retrospectively and selectively write about epiphanies that stem from, or are made possible by, being part of a culture and/or by possessing a particular cultural identity,” (p. 276). This approach of positioning the researcher not as the centre of the research endeavour, but as a member of the community under study, responds directly to some of the challenges presented by the current research.

Autoethnographers often seek “to produce aesthetic and evocative thick descriptions of personal and interpersonal experience” (Ellis et al., 2011, p. 276). Some of these approaches are gathered together under the label of ‘evocative ethnographies’ (Anderson, 2006) and while this approach might resolve the challenge inherent in my dual roles as researcher and researched, it won’t necessarily prepare other school leaders to guide their communities through a similar process. Ellis et al. (2011) suggested that in addition to merely telling about experiences, autoethnographers are often required to offer a level of analysis around these experiences using their “methodological tools and research literature” (p. 276). This, they argue, is a way for the researcher to use personal experience to illustrate facets of cultural experience, and in so doing “make characteristics of a culture familiar for insiders and outsiders” (p. 276).
ANALYTIC AUTOETHNOGRAPHY

Analytic autoethnography prioritises sense-making and the gaining of insights while responding to the challenge related to the positioning of self. The purpose of this approach is to “understand the topic under study by placing it within a social analytic context” (Anderson, 2006, p. 378). Anderson (2006) argues that analytic autoethnography takes place when the researcher is:

1. A full member in the research group or setting;
2. Visible as such a member in published texts; and
3. Committed to developing theoretical understandings of broader social phenomena (p. 375).

The key feature that differentiates analytic autoethnography from other forms of autoethnography is the commitment to improving theoretical understandings. Applied to my work in schools, this approach allows me to improve the community’s theoretical understandings while operating within that community. It also extends the reach of this theoretical understanding by producing ‘more accessible texts’ than conventional approaches to research, which in turn makes “social and personal change possible for more people” (Ellis et al., 2011, p. 277).

METHODS

SELECTION

Selection of co-participants is guided by the principle that the autoethnographer is “the ultimate participant in a dual participant-observer role” (Merton, 1988, cited in Anderson, 2006, p. 379). First and foremost, co-participants must be part of the cultural group under investigation: “a social world with clear locales and sub-culture” (Anderson, 2006, p.379). To further establish “the boundaries of the phenomenon” (Preissle Goetz & LeCompte, 1984, p. 66), the cultural group in this project was defined as New Zealand public school leaders who engaged in the process of implementing ILEs. Further criteria have also been applied to this group in order to ensure the selection is appropriate to the methodology. These criteria include:

1. Leaders of existing schools (not new builds);
2. Leaders of schools implementing ILEs; and
3. Leaders of schools with whom I have had an existing relationship of twelve months or more.

These criteria are designed to meet the requirements of autoethnography and to ensure that selection can “with some measurable margin for error, be asserted to represent the whole group from which it was extracted” (Preissle Goetz & LeCompte, 1984, p. 66).

In addition to interactive interviews with co-participants, a ‘key informant’ was employed to triangulate the sense-making with co-participants as it takes place. A key informant is a confidant and trusted advisor to the researcher – chosen because “they possess special qualifications such as a particular status, wide communications, or even accurate information for the study” (Young & Young, 2008, cited in Faifua, 2014).
**DATA COLLECTION**

Several of the potential pitfalls of autoethnography can be hedged against with a careful and strategic data collection plan. I propose to use approaches that fall into two categories: internal and external.

The internal approach will include my own reflections, a timeline of events from my appointment calendar, personal memories supported by my research journal, field notes and other cultural artefacts such as presentations and activities developed with co-participants. These data will inform my analysis of the culture under study and myself as a reflexive researcher.

External sources of data will include artefacts that arise out of professional development, activities inside co-participants’ schools and transcripts of interactive interviews with co-participants. In addition, I will also engage the expertise of the ‘key informant’ in order to assist with sense-making, triangulation and checking of assumptions.

**NARRATIVE ANALYSIS**

Chang (2008) advises against approaching the analysis and writing process with preconceived notions of predicted outcomes, cautioning that in autoethnography “data analysis and interpretation hinge on data collection … [and is] often not prescribed by a rigid research design” (p. 67). A flexible plan to analyse and interpret data is required because of the fluidity of the process. Taking into consideration Chang’s (2008) recommendations, a narrative analysis will be employed within this research. This approach enables the researcher to analyse the experience of educators, particularly those undergoing emotional of difficult experiences, such as when implementing disruptive change (Cortazzi, 1993). Taking into consideration Riessman’s (2005) notion that narratives “do not mirror, they refract the past” (p. 6), I have found Grumet’s (1990) notion of a ‘triad of voices’ to be a useful framework from which to work. Grumet proposes that situation, narrative and interpretation offer different opportunities for understanding: situation being the context of the narrative – physical, social, cultural, political; narrative relating to specific experiences focussed through the interviewee’s voice; and interpretation relating to a more reflexive and distant voice i.e. reflection on the meaning of the narrative and its relevance to current circumstances (Grumet, 1990, cited in Cortazzi, 1993).

**CONCLUSION**

This paper described the approach being taken by the author to researching the process of school leaders leading the implementation of innovative learning environments in New Zealand schools, with a particular focus on change leadership.

Ultimately, this investigation highlights an important aspect of the broader field of learning environment research – particularly that related to the development of innovative learning environments. The outcomes of the project are anticipated to aide school leaders in supporting their communities through the process of implementing disruptive change in innovative learning environments, and in schools more generally.
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