

Leadership, equality, and legislation: from theory to action. A case study from Ireland.

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Introduction

Equality is increasingly viewed as integral to public policy. Its rhetorical and practical significance is signalled as a core constituent in the educational aims and purposes of educators and education policy makers alike; at various levels, leaders often trumpet moral aspirations towards educational equality as key to their organisation's existence and progress, most recently in relation to inclusion and social justice agendas. This paper considers the extent to which anti-discrimination legislation provides a necessary or sufficient framework for pursuing equality in education; this is considered in relation to a case study of equal status audits piloted in one Irish region, and examines challenges in making progress towards 'equality proofing' and for education leaders tasked with ensuring legal compliance and educational inclusion. The specific case is considered in relation to four recurrent themes:

First, long-standing debate about what constitutes educational equality or inequality;

Second, and simultaneously, debates about how and to what extent equality is achievable;

Third, the contribution of anti-discrimination legislation and related grounds as a basis (or not) for the translation of equality principles into practice;

and

Fourth, persistent over-estimation by education leaders about the extent of equality within their organisations.

In combination, we argue that all affect and are reflected in education organizations which purport to be egalitarian in intent and practice, and by those lead and manage them. These themes are now introduced, and then considered in relation to the case study.

Defining educational equality

There are at least four definitions of educational equality. Drawing especially upon Grisay (1984) and recent Europe-wide studies (European Group for Research on Equity on Social Systems, 2005), each is a response to the question 'Equality of what?' posed by Sen (1992).

Some definitions are overlapping; several are contested; all are approximations to reality. A key point is that they are variously understood and misunderstood.

Equality of opportunity

With a focus upon equality of opportunity, an underlying principle is that all individuals should have the same opportunities to access learning. It follows that disadvantages associated with individuals' social, cultural, and education backgrounds ought not to influence those opportunities. Disadvantages are magnified when they are systematically experienced by groups, for example, asylum seekers. Attempts to translate this principle into practice have frequently been thwarted, in part or whole by the myriad ways in which underlying principles of education, enshrined, for example, in existing curricula and pedagogies, mediate, in practice, against such intentions. This includes the privileging of certain kinds of knowledge over others. Equality of opportunity has a particular appeal in educational systems described as meritocratic, where equality of opportunity does not necessarily equate with equality of outcome, and is described elsewhere as the Matthew Effect¹. As a consequence of 'higher' aptitudes and 'more' abilities evidenced through 'high' educational performance, some individuals, it is argued, deserve to have more and/or better rights/opportunities/power/wealth than others.

Equality of treatment

When the focus is upon equality of treatment, advocacy is towards comprehensive education for all. From this perspective, the existence of 'elite' or 'selective' schools, and their corollary, 'ghetto' or 'sink' schools, engender and magnify educational inequalities. Supporters demand common curricula and schooling for all, an advocacy that is underpinned by the view that all have the capacity to learn, and therefore, benefit from education throughout life. This principle has been variously criticized, most fundamentally by egalitarians who argue that equality of treatment sustains equality rather than reduces it, in the sense that some learners require more and better conditions and support than others (especially those already disadvantaged by situations external to schooling) if they are to achieve success.

Equality of achievement

Here, proponents argue for education to ensure all students achieve success in basic skills and also benefit from opportunities provided by alternative curricula. The emphasis is upon positive action to support those experiencing prior disadvantage. Advocates support innovative forms of curricula and assessment, specialist support for those disadvantaged, and an emphasis upon knowledge previously considered of low status. Such approaches are criticised by those most likely to benefit from the *status quo*, but also by those who balk at the fundamental changes in curricula, pedagogies, and resource allocations that this would entail. Some stakeholders want to resist, in their terms, a descent into mediocrity. Sometimes described as the Robin Hood Effect², critics also argue that such approaches prevent the 'best' students from achieving their potential.

Equality of social fulfilment

In relation to social fulfilment, links are made between education outcomes and predicted implications for life chances and the kind of society in which citizens might derive most

¹ For to him that has will more be given, and he will have in abundance; but from him who has not, even what he has will be taken away (Matthew, ch.13:12) (European Group for Research in Social Systems, 2005).

² As with Robin Hood, the English outlaw, who robbed the rich to give to the poor (*ibid*).

individual and communal benefit. The assumption is that education organisations ought to be pro-active in ensuring their contribution to a society in which different talents and characteristics are recognised, in the absence of any assumed hierarchy. The emphasis is upon education as empowering and explicitly political; differences among students and curricula are celebrated and provide positive educational and political momentum towards active citizenship. Critics question the ideologies and practicalities of such intentions, especially where preferred standards of excellence persist, academic qualifications remain higher status than vocational, and community or 'grass roots' education is viewed as a marginalised educational sub-culture.

In practice, governments have tried to mix and match the above; at the micro-and meso-levels of education, the task for education leaders is to manage the contradictions and anomalies that are frequently features of political expediency, ideological confusion, and short-termism. However, there is almost universal acknowledgement that what happens within educational organisations is, in part, determined by conditions that exist beyond them, that education organisations have the potential to decrease (or increase) inequalities by modifying their systems and processes, but within the opportunities and constraints of the education and legal systems in which they also embedded. In this sense, the Irish case, whilst having some distinctive characteristics (see below), is by no means exceptional. A core concern has been whether commitments to educational equality ought to be given legal force, what forms that force should take, and when it does, whether it leads to increased equality in education and/or positive action by education leaders.

Legislative impetus

Some commentators have long argued that equality ought to be legislated. Baker *et al* (2004:23) provide at least one justification, pointing out that even in societies where equality is viewed as an aspect of morality, the former is not always linked to social justice or civil rights, some groups preferring to see the amelioration of disadvantage as an act of charity rather than a legal right. Yet, the latter has a long intellectual history: Dewey (1902) argued that it was not enough to proclaim equality as if it was a moral code, the core issue being that it was legality that gave equality its significance: 'the very fact of natural or psychological inequality is all the more reason for establishment by law of equality of opportunity, since otherwise the former becomes a means of oppression of the less gifted' (cited by the European Group for Research on Equality in Social Systems, 2005:111). Husen (1972) (*op.cit.* p.111, *our emphasis*) makes an even stronger point, arguing that 'in order to achieve the objective of equality *at all costs*, it may be necessary to act against the wishes of families who are indifferent to the [equality in education] measures envisaged by society'. Not surprisingly, it is the 'at all cost' element that has concentrated the minds of educators and politicians historically, and of various ideological persuasions. Elsewhere, others are much more cautious about the contribution of legality to reduce inequality (Coleman, 1966:135; Baker *et al* 2004), to the extent that the law may embed the very inequality it sets out to impede. This is an argument to which we will return. Meanwhile, anti-discrimination legislation has been a notable feature of governments' responsiveness to inequality, often framed (for example, in the UK) around laws relating to gender and 'race', especially with regard to employment, and more recently to education. In Ireland, the legislative vehicle is employment equality and equal status legislation. (This is not to ignore other laws that have the potential to promote equality (or inequality) but are beyond the scope of this paper.)

Given this legislative head of steam, it is important to consider the extent to which the term equality has penetrated education, and the degree to which it forms a bedrock upon which

legislation might give added impetus (or indeed vice versa). Not all signs are promising, and historically, education's contribution to equality has been mixed. This includes the practices of education leaders and managers, albeit within the constraints and circumscriptions of an increasingly bewildering mishmash of policy initiatives.

Equality: achieved or achievable

We have already signalled debates about educational equality that are long-standing and contested. Following Baker *et al*, there are two main positions: liberal egalitarianism, in which commitment to 'minimum standards...and key principles of non-discrimination' is paramount, and 'equality of condition' (Nussbaum, 2000). In the latter, there are attempts to couple equality of opportunity with outcomes. The first, it is argued, is attempted without widespread change in structural conditions; the second is predicated on structural change. Four challenges are discernible; according to Baker *et al*, these refer to inequalities in 'educational and related resources', 'respect and recognition', 'power', and 'love, care, and solidarity'.

With regard to the *first* challenge, education is increasingly a market commodity, with schools vying for students and staff most likely to succeed, a tendency exaggerated by league tables and performance management, and further aggravated by selection mechanisms and unequal resourcing. In addition, knowledge regimes continue to favour those with linguistic or mathematical capabilities over oral capabilities (Bernstein, 1971; Bourdieu 1973), academic over vocational education (Lumby and Foskett, 2005), and some forms of denominational over non-denominational education, on gender, religious, or other grounds (specific features of the Irish case).

Second, it is argued that a range of school-based practices engender lack of respect and recognition (for some students and/or staff), especially on the grounds of religious beliefs, disability, gender, and sexual orientation. Again, Baker *et al* (2004:154) express this succinctly, referring to 'a general silencing or invisibility that is often accompanied by devaluation or condemnation; a systematic bias in the syllabus and practices of schools; and the segregation into different classes and schools.'

A *third* issue relates to the formal and informal exercise of power and authority where inequality is the most pernicious in its actions and effects, and manifest in curricula, pedagogies, and assessment, as well as relationships among staff, between staff and principals, between staff and students, among students, and between stakeholders.

Fourth, inequalities in love, care, and solidarity for some students and staff (Baker *et al*, 2004) are frequently overlooked in education organisations, as are many 'emotional' aspects of leading, teaching and learning. For those students (and/or staff) who lack emotional support in their personal and education lives, and include differences in gender, ethnic, or sexual orientations, there are prospects for multiple disadvantage, inequality, and invisibility.

In relation to any of the above challenges, one might expect equality to be a strong focal point for educators and researchers with interests in education leadership and management. Remarkably, perhaps, this is not always so. Several tendencies are discernible: shifting understandings and priorities in the field of education as it relates to equality; changing cultures of headship and leadership; and cultural presumptions among leaders about the permeability of equality concerns beyond organisational mission statements. These are also linked to tendencies among researchers, policy makers, and practitioners to compartmentalise not only education leadership and management as a sub-set of educational concerns but, as a result of

that compartmentalization, to ignore (with exceptions) the wider literature on inequality, as if it was a conceptual and practical entity which lacked inter-dependence with the theories and practice of leadership. We now explore these tendencies further.

Influencing Education Leadership

In many European states, equality has been part of education-speak for at least sixty years, but emphases and priorities change. Several examples are illustrative. An earlier focus upon discrimination against girls has shifted to a greater emphasis upon under-achievement by boys (Weiner, Arnot, and David, 1997). Interest in diversity, seen by some as synonymous with race equality and/or multiculturalism (Osler, 2006), has waxed and waned and waxed again, most recently with burgeoning interest in diversity among leaders (Lorbiecki and Jack, 2000; Shah, 2006) as well as students. However, this remains the case for some nations rather than others, and, within nations, by some local authorities and schools more than others.

Moreover, not all aspects of equality receive the same attention by policy makers, by practitioner leaders, or by researchers. Even in countries with a written constitutional reference to equality before the law, as in Ireland, 'constitutional provision has had relatively little impact on discriminatory practices...because for most of its history it was effectively sidelined by the judiciary' (Whyte, 2006). Issues relating to sexual orientation, or nomadic communities, for example, have received less attention than those which pertain to ethnicity or 'race', gender, or disability. Issues of religion, sometimes linked to ethnicity, are differently nuanced among nation states, for example, with Islam of particular concern in England and France, Catholicism and Protestantism in Northern Ireland. Implications are multiple: in some nation states there is relatively little 'equality proofing' practice for leaders to draw upon at any level; in others, only specific aspects of the principles could be usefully be considered because actual contexts affect transferability in practice.

Notwithstanding such challenges, the term 'leadership with' and 'for diversity' is becoming part of the discourse of education management and leadership but, with exceptions (Lumby *et al*, 2005), is not always linked to equality concerns. This is despite published research to demonstrate, in the UK context, for example, that whilst race equality is part of the remit for school inspectors, it was, at least to 2000, being effectively side-lined as a specific concern for them or for school leaders (Osler and Morrison, 2000). Meanwhile, education leadership and management research in the UK has, until recently (with exceptions like McKenley and Gordon, (2002) and Bush *et als* (2006)), mostly by-passed issues of equality as they pertain to leaders, and, according to Osler (2006), ignored publications in relation to race, equality and diversity (Osler and Morrison, 2000; 2002). A number of reasons are discernible. Osler (2006) points to avoidance within the educational management consultancy community (citing Hobby (2004) as an example). A second reason relates to an insistence to consider equality in relation to one or two dimensions rather than as a composite whole. In which case, it is hardly surprising to discover a propensity among education leaders, and some researchers, to consider characteristics like 'race' or gender separately or sequentially as aspects of management policy, dealing with one aspect before moving on to consider others. This is discussed by Morrison *et al* (2006:287) in a focus group with senior leaders of an English FE college who noted practice in which:

diversity focuses on one aspect at a time rather than its multiple aspects...The focus [currently] is very much to do with disability and to some extent that's got in the way of pushing the agenda on race and gender in the way we should have done.

Another reason, it is suggested, relates to diminishing prospects for explicitly 'critical' leadership forms during an era of growing external accountability and prescribed forms of performance management. The suggestion is that equality concerns may be less obtainable, or, at least, seen as more 'risky' by leaders under new conditions of marketisation and accountability (Gunter, 2001:103). The potential for persistent inequality is, perhaps, most deeply entrenched in educational systems where power and control are experienced as top-down, hierarchical arrangements are key drivers underpinning staff-student relations, there is an absence of 'real' authority by staff, parents, local community, or students, and in which the curriculum is unlikely to be enacted in terms of wide-ranging discussion about equality, equal status, or diversity.

Finally, there is also evidence to suggest that leaders consistently assess the degree of equality which exists in their organisation more positively than do others in the same (Gagnon and Cornelius, 2000), and/or believe that, therefore, equality is an embedded feature of the organisations led by them when it is not (Prasad *et als*, 1997). Faced with contradiction and dilemma (Gunter, 2001:104), leaders may find the prospect of 'explicit commitment to democratic ideals based on human rights' (Osler, 2006:142) laudable rather than practicable. In Osler and Morrison's (2000:56) research in England, for example, race equality was likened by senior education inspection officials to one more 'bauble' on an inspection Christmas tree, that, already over-laden, was likely to topple over if it was added.

Such themes are now considered in relation to Ireland. Contextual factors are first introduced.

Policy drivers in Ireland

National contexts

At least two converging influences towards equality legislation are identifiable. The first relates to the implications of globalization linked to Ireland's membership of the European Union, together with the needs arising from the physical movement of people from a diversity of backgrounds, across national and regional boundaries. In the second, there are changes in the process of growing up and experiencing adulthood. 'Very cursorily put, what is happening is that tradition and custom are still shaping our lives but much less than it used to do' (Giddens, 2000:20). Among the outcomes is living in a period of 'fuzzy sovereignty' (*ibid*) in which Ireland is redefining elements of its past in relation to prospects for the future, set against a context of increasing scepticism among some citizens, both of politics and religion, the rise of multiple identities, and the juxtaposition, struggles even between fundamentalism and late modernity.

Education policy

Equality underpins education policy; there is a 'need to identify and correct educational disadvantage' (DES, 2004:28) and for 'integrative, inclusive education' (*ibid* p.27).³ A raft of

³ The primary stage of education is for 6-12 year olds, and for second level, 12-16 years of age. The latter includes two stages, lower and upper secondary, commonly referred to as the junior and senior cycles respectively. Most children start first level education at 4-5 years (in 'early start' and 'pre-infant' classes) and this is publicly funded. The third level comprises universities, technical institutes, and colleges. Adult provision is increasingly directed towards those who left school early or are without qualifications. Second level schools comprise secondary, vocational, community and comprehensive schools. Each have distinct historical contexts, and include a large number of denominationally controlled schools. Junior and senior certification dominate the post-primary sector, not surprisingly because they still comprise the main routeway to the third level. A recently instigated transition year between the junior and senior cycles is strongly advocated. During the senior cycle, the choice of route is three-fold: towards a General Leaving Certificate, a Leaving Certificate Vocational programme (LCVP) and a Leaving Certificate Applied (LCA). Not all schools concentrate equally on all three.

legislation includes the Employment Act 1998 and Equal Status Acts 2000 to 2004. The language used by the DES/ Equality Authority applies 'softer' can-do discourses of school development planning (a relatively new concept in Irish education) to integrate equality interests with 'required-to-do' in accordance with equal status legislation. There is also recognition that for imposed legislation to be effective long term, change must be owned by those required to action it. And, in Ireland (as elsewhere) this represents considerable challenges, given a range of vested interests that include fundamentalist stances that are coupled historically with the wielding of considerable power, influence, and autonomy, to the extent that some inequalities have become embedded in legislation by way of legal exemptions (see below).

In brief, equal status legislation is a response to six main challenges:

1. *Socio-economic factors*
Socio-economic deprivation persistently affects rates of participation and retention in education, and adult literacy and numeracy.
2. *Denominational control*
Irish education is largely denominationally controlled at primary and post-primary levels. This gives rise to challenges, including the extent to which more privatised beliefs can be accommodated as 'difference' that can be included as institutional curricula especially if it counters established religious teachings.
3. *Education as a unifying tendency*
Ireland's history is one in which education has been viewed as a highly valued unifying system. Yet, the equal status agenda is seen by some to dilute that value, exploring and recognising multiple identities and beliefs, especially when linked to evidence that suggests a declining consensus on matters of family values, sexual mores, and trust in others (Fahey, Hayes, and Sinnott, 2005).
4. *The locus of power and control*
Power and control are concentrated, and affect the way in which equality and diversity, in particular the interests of minority groups, are viewed (Lodge and Lynch, 2004). Powerful bodies include the Churches, Teacher Unions, the Vocational Educational Committees (VEC) (who manage non-denominational schools), and the Department for Education and Science (DES).
5. *Structural issues*
Distinctively, Ireland has high levels of private ownership and denominational control, and of segregation by gender and religion. Until recently, most students with disabilities were educated in special schools, and members of Traveller Communities in training centres. More recently, crude distinctions between academic (denominational) and vocational (non-denominational) schools have become more blurred. Moreover, it might be argued that equality legislation mounts a direct challenge to the considerable discretion currently afforded at local levels in the interpretation of national curricula.
6. *Adult and community education*
The mix of state and private provision extends into the tertiary sector. A number of recent developments include a National Qualifications Framework. The challenge has been to maintain a core mission for adult and continuing education when there is a plethora of fixed term funding for a range of initiatives, many employment orientated.

Recent equal status legislation (2000-2004) is applicable to all education sectors. This is now summarized.

Equal status legislation

There are nine grounds on which discrimination is prohibited:

- *Gender*
Being male, female or transsexual
- *Marital status*
Being single, married, separated, divorced, or widowed.
- *Family status*
Being pregnant or having responsibility for a person under 18 years of age, or as a primary carer in relation to an adult with a disability who needs care and support on a continuing, regular, or frequent basis
- *Sexual orientation*
Being heterosexual, homosexual, or bisexual
- *Religion*
Having religious beliefs or having none; the term includes religious background or outlook
- *Age*
Applies to everyone over 18
- *Disability*
The term disability is broadly defined. It covers a range of impairments or illnesses, including physical, sensory and intellectual disabilities. Disability does not need to give rise to special needs, as used in education legislation to refer to Special Educational Needs (SEN).
- *Race*
Includes race, colour, nationality, ethnic or national origins
- *Membership of the Traveller Community*
People who are commonly called Travellers, who are identified by both Travellers and others as people with a shared history, culture, and traditions, identified historically as having a nomadic way of life on the island of Ireland.

To expand briefly, *discrimination* refers to a situation in which a person is treated less favourably than another in relation to any of the nine grounds cited above. Discrimination can be direct or indirect – by impact or association – when a person is treated less favourably because of that association. *Harassment* and *sexual harassment* refer to unwanted verbal or non-verbal behaviour⁴. It prohibits principals, teachers, and those in positions of responsibility from harassing students **or** to permit students or others to do the same to students or others, including staff. The *victimisation* of any person who takes action on any of these grounds is similarly forbidden.

The legislation describes the provision of *reasonable accommodation*. This raises a number of interesting issues, not least of which is the provision for students with disabilities. The Acts oblige education institutions to provide special treatment, facilities or make adjustments if they give rise to 'no more than nominal cost'. It is difficult to decipher what this means in current practice. But it seems that the implications of nominal cost depend upon the circumstances of the individual service provider, with the larger, well-resourced organisation being, in theory,

⁴ In relation to harassment a single incident comes within the legislation.

better placed to afford 'reasonable' levels of accommodation than a smaller one. Meanwhile, official documentation (DES/Equality Authority, nd: 10) suggests that the main barriers to inclusion are cultural rather than high-cost.⁵ Legislation also enables *positive action*, allowing organizations to provide preferential treatment and take positive measures to promote equality of opportunity and/or provide for the special needs of students, by specific arrangements, services, or assistance across the nine grounds. Catering for special needs is, therefore, not confined to those with physical or emotional difficulties or only for students with learning needs enshrined in SEN legislation.

There are a number of *exemptions* regarding the enforcement of equal status in educational settings. The most relevant relate to gender and religion. Single sex schools are both allowed and common place. Where the objective is to provide education in an environment that promotes certain religious values, an institution can admit a student of a particular religious denomination in preference to others, and also refuse admission if it can be demonstrated that refusal is necessary to retain the ethos of the school. Differential treatment is not allowed in relation to sporting events unless it can be shown to be 'reasonably necessary', and therefore allowed under disability, gender, and age grounds. Whilst the Acts are premised on the mainstreaming of students with disabilities, certain exemptions are allowed if it can be shown that the provision of services to a disabled student would have a detrimental effect upon the provision of services to other students. In practice, various interpretations of terms like 'reasonable', 'specific ethos' and 'detrimental' may underpin (or indeed serve to undermine) intended interpretations of the Acts.

Equal Status audits: the research

As part of its strategic framework for equality management, a regional education service which we call Cavanagh, a pseudonym to respect needs for anonymity and confidentiality, commissioned Morrison and Lumby at the International Institute of Educational Leadership, University of Lincoln, to work with Cavanagh to pilot equal status reviews, called audits, in three educational settings - two post-primary schools and an adult education centre, both non-denominational and of mixed gender (Morrison and Lumby, 2006a, b, c) in order to consider the extent to which that authority was compliant with 'new' legislation and how it might move forward the equality proofing agenda. Cavanagh Education Service is one of many services operating in Ireland under the aegis of the Vocational Education Act (1930) and its amendments to provide a comprehensive range of services, and is the statutory authority for the area.

Funded by the Equality Authority, the audit applied mixed methods to complex and sensitive issues of equal status, rejecting an adherence to quantitative or qualitative approaches in isolation. Quantitative audit, derived mainly through questionnaire survey, was used to address the 'what' and 'how many' questions; qualitative audit was used mainly to address the 'how' and 'why'. Mindful that this was a relatively small sample pilot and that findings are indicative, exploratory, and developmental, eight tools for audit were developed in two stages as generic instruments that could be applied in a range of educational settings elsewhere in Cavanagh, and with development, beyond. The first six comprised a staff questionnaire; focus groups with young and adult learners; individual interviews with learners; telephone interviews with parents; documentary research; and interviews with principals/centre manager. An analysis of the

⁵ More problematically, a potential student's entitlement to additional special resources being funded by the DES is dependent upon the student already being enrolled, creating a time lag between the organisation having the necessary resources in place and the student having access to the resources to which s/he is entitled.

outcomes of these tools was used to suggest two further tools, namely review-and-plan and equal status indicator frameworks.

The audit centred upon two set of core questions. Analysis of the first four questions was used to formulate the second. The questions posed were as follows:

1. What knowledge exists about ES legislation?
2. How and from which perspectives are the terms used in the legislation understood?
3. What are current perceptions about equality-centred organisational practices?
4. How are they understood (or not) in relation to ES legislation?

5. Are organisational practices being developed in ways which prioritise inclusive education and equity?
6. What does the evidence suggest about required planning priorities for the pilot organisations, and why?
7. What does the evidence suggest about required planning priorities for Cavanagh Education Service?
8. How might ES issues be addressed within organisations and by Cavanagh?

For the Equality Authority, two further methodological questions were of importance, and related to whether the tools piloted provided a sufficiently rigorous evidential base (q. 9), for use beyond the pilot (q.10).

Research purposes were interesting and complex, not least because of the sensitivity of matters pertaining to equal status but also because the audit was located at the interface of at least two juxtapositions in the relation between the law and educational practice. The first relation is summative and specific, focused upon legal compliance and the nine grounds; the second, is formative and generic, in which legislation is seen as 'building blocks for the creation of a more inclusive school' (DES/EA nd: 1). The explicit inclination of and direction by the sponsors was towards the latter, although the implications of the first were omnipresent. Formative inclinations were also restricted by the time-scale of the project, and limited opportunities for 'inside-out' research (starting where respondents were) rather than outside-in approaches. The role of the steering group, which contained representatives from the pilot organisations, therefore, was especially important throughout. Outcomes were reported to the pilot organisations, to Cavanagh, and to the Equality Authority.

In the following sections, sample elements of the research evidence are considered as illustrative of the themes introduced in the opening sections of the paper before returning to the wider issues in which they are embedded. In keeping with the paper's intentions, discussion pays particular attention to theme 4 and implications for education leadership.

Discussion

Theme 1: What constitutes equality

The audit tools gave access and 'voice' to a range of views in relation to each of the nine grounds, drawing out, for Cavanagh, recurrent 'equality' themes across organisations where there appeared to be sufficient agreement about issues that required further consideration and/or action across sites. Importantly, detailed understandings among staff about the implications of recent ES legislation were limited, disparate, or not known. This is not to convey a sense that staff lacked understandings about equality or its manifestations in the

organizations they worked, but to point out that explicit linkage to the nine grounds was frequently missing, not known, or assumed to be 'covered' by organisational or individual presumptions about 'equality'. A further view was that equal status legislation was or ought to be less of a priority for managers and staff than the immediacy of other resourcing concerns, and that an assumed non-existence (within the catchment areas) of certain categories of individuals identified in the ES legislation also implied 'no problem here' (see also below).

Theme 2: What equality means

Various understandings about what equality means and/or entails were revealed. The exemplar of the gender ground is illustrative. If this is considered to be more than a matter of compliance, but of creating and developing cultures so that all young people and adults could flourish, the gender ground was variously understood. The researchers invited participants among staff, students, and parents to consider gender issues in relation to written policies, curricula, and behaviour and discipline. Senior school leaders and staff varied in their understanding of what policy existed in relation to gender equality. In part, this related to a paucity in policy documents overall in relation to each of the nine grounds. (Whilst policy documents are neither substitutes for, nor digression from equality proofing in practice, they do have the potential to act as a springboard to purposive review and action.)

Gender equity issues linked to *curricula* were noted by student participants and by staff, who, with exceptions, considered current curricula practices as effective counterpoints to gendered inequity in access or outcomes. Overall, neither students nor parents perceived subject choices to be strongly hampered by gender issues. Yet, this was in considerable contrast to views about *behaviour and discipline*. The latter is important since it penetrates the ethos of an individual organisation, and affects the way learners 'feel' that what happens in their learning situation reflects positively on the gender ground and is reflected in equitable treatment. The commonality of findings was sufficiently thought-provoking to suggest evidence, in some cases, of differential treatment on the gender ground in the classroom, in terms of discipline and behaviour management, and in relation to extra-curricular activities.

A second example pertains to the ground of sexual orientation. The evidence from this audit, albeit with relatively small-scale data sets, is one of the few researches in Ireland about young people's views with regard to sexual orientation. Findings demonstrated that the implications of anti-discrimination legislation on this ground had not, for the most part, permeated the policy and practices of the educational organizations in which the pilot audits took place. An important finding related to curriculum 'silence' about the ground. Young people could recall 'relationships' lessons but none that specifically linked to sexual orientation; lessons were also perceived to depend, in delivery, upon individual teachers. A consensus view among young people was that being gay would lead to young people being treated differently, and although the emphatic response was not uniform, it was linked to name-calling and bullying. As evidenced, gay young people appear to be in a cleft stick – if they admit to being gay, this may exacerbate the bullying; if they do not, other young people considered that this exacerbates the bullying.

Importantly, in Ireland, teachers have been seen, at best, as a weak force to counter such bullying (Galvin and Norman, 2005), and our evidence showed support for this. Reasons varied but related, in the main, to students' views about teachers' awareness but unwillingness or incapacity to act to counter homophobic name-calling or bullying. In our report, we highlighted evidence to suggest that gay young people were being educated in environments

that, whilst explicitly committed to equality, were likely to seriously undermine the self-esteem of some students, and so be destructive of their learning.

Theme 3: the contribution of anti-discrimination legislation in translating equality principles into practice

Here, we draw on the ground of membership of the Traveller Community as an illustrative example. Despite the Traveller Community being indigenous to Ireland for several hundred years, there is relatively little research about their experience; available literature points to negative images, characterized in education by high levels of student drop-out, early leaving, isolation in school, problems with school enrolment, poverty, and a lack of administrative flexibility to deal with nomadic rather than sedentary life styles (Lodge and Lynch, 2004). Given explicit reference in ES legislation to the Traveller Community, it might be expected that the latter would, in the organizations audited, provide a focal point for equality interests. In one organization, staff responses suggested it was. Yet, our research demonstrated extremely negative views among young people that Travellers excluded themselves by their attitudes and behaviours. The positive attention given by staff to those who, in young people's terms, operated outside the norm of schooling, was resented. Even where there were no Traveller students, the view was strongly held that if they *did* attend they would be viewed negatively as criminally deviant, aggressive, and/or clannish. Acceptance by some that such attitudes were unfair was counteracted by a view that everyone had a right to 'free' speech and opinion. The conclusions reached by the research team were that, in the contexts of widespread acknowledgement of stereotyping and prejudice against the Traveller Community, and an absence of strategic and operational policies and processes to counteract them, both direct and indirect discrimination would occur on this ground. This suggests that, as yet, whilst anti-discrimination had permeated some aspects of Irish society, more inroads are needed into education.

Theme 4: Education leaders and equality concerns

Throughout the audit, there was an espoused commitment to equality by educational leaders underpinned by a conviction that the organizations in which they worked were, explicitly and/or implicitly, work and study environments committed to the pursuance of equality aims and objectives. Drawing upon the words of staff, parents, and students, our evidence both supports and contests that conviction, in learning environments where commitment to equality was sometimes seen as sufficiently important enough to be written down and/or highlighted in practice, and sometimes not. In completing research questionnaires, some staff commented that the summary of the legislation given at the start of the exercise had been a learning exercise in itself; others wondered if the relevance of ES legislation might be more appropriate or more necessary for sectors other than education.

In view of leaders' espoused commitments to equality, it seems important to ask how and why the rhetoric of equality co-exists with the kinds of evidence presented above. With published evidence that leaders and managers consistently assess the degree of equality more positively than others in their organisation (Gagnon and Cornelius, 2000), our research findings offer further support to that view. Several explanations are proffered.

One pertains to the minority status, numerically, of those who may be vulnerable under the nine grounds, so that having few or no students (or staff) who are or admit to being gay, of a different religion, members of the Traveller community, of an ethnic identity other than White Irish etc, is translated into assumptions that there are few or 'no problems' on a specific ground. There are precedents with regard to research in 'all white' schools in England (Osler and

Morrison, 2000). Moreover, in terms of legal compliance, it is as if the absence of a 'complainant' or 'potential complainant' on any ground also implies the non-existence of an actual or potential discrimination problem. Yet, importantly, numeric scarcity denies a role for schools in encouraging students to acknowledge and value difference, or to develop their ideas and values through what is taught and learnt directly and indirectly. It also ignores tendencies for those with minority views or status to remain invisible.

A further explanation has already been referred to, namely that leaders also tend to believe that it is their individual orientations towards equality and those of individual staff which matter. This individualizing concept or espoused belief in equality is also extended into school practices, containing contradictory elements which co-exist. Two such elements relate to assumptions that the potential for inequity can be resolved by attending to the specific needs of certain individuals (for example, those defined as having disabilities) by individual actions, whilst simultaneously advocating the treatment of 'other' learners who may be vulnerable on other grounds, in terms of 'sameness' (the 'equality of treatment' argument). In combination, both neglect the extent to which unequal status is a structural condition requiring group-focused rather than individualized actions.

Our recommendations to Cavanagh, therefore, were for a 'diversity plus' model, focused on the needs of groups rather than individuals, and rejecting short-term one-off staff training days to 'do' diversity, likened to a 'sheep-dip' approach. Rather, *structural* changes were recommended at authority level, linked to the strategic and operational spear-heading of change at local systems levels and in relation to policy, review and action. Structures and *attitudes* were mutually implicated, and linked to the need for long-term, sustained support. The exemplars shown above reveal the sensitivities involved and the scale of interventions required. This is likely to involve much more than an imposition of school development planning and staff training. The prospects of impact are considered greater when embedded as part of wider strategies, and with a range of stakeholders. Research also identified a range of concerns about *teaching and learning*; recommendations were to review the balance in the curriculum between the academic and the vocational, of content and assessment, and of the importance given to 'relationships' or citizenship education. Again, the implications for local as well as organisational leaders are the extent to which they view themselves and others as pedagogic as well as administrative leaders. For Cavanagh Education Service, a number of responses were suggested, some relatively resource-free, for example, adjusting anti-bullying policies in response to equal status priorities, and others resource-full, for example, the establishment of child-care facilities at an adult education site. Overall, our recommendations were for long-term sustained measures that carry people with them.

Conclusions

Finally, we return to the wider issue of legal imperatives and, drawing upon the Irish case, the potential for 'policy induced change' (following Gaine, 2001) to effect educational equality.

Taking legal imperatives first:

In participative democracies, legislation continues to provide leverage towards equality, in this case, to education. Indeed, in our opening we presented arguments in support of giving equality-proofing legal force. What prospects, therefore, does ES legislation hold for those who lead, work, and study in educational organizations? According to Baker *et als* (2004: chapter 7), and notwithstanding some positive aspects, laws often do as much to shore up inequalities as they do to lessen them, mainly because they are part of the structural conditions that mask inequities in power and resource. Three limitations are noted: first, anti-discrimination

legislation focuses upon individual complainants rather than groups. Taking action individually is more than an act of moral courage. It requires legal 'know-how' and an abundance of 'cultural capital' (Bourdieu, 1973) in complex environments where discrimination refers to single rather than multiple identities (being divorced or gay or black, as examples). Second, equality legislation tends to treat all potential complainants 'symmetrically' (Baker *et als*, 2004), in other words, representatives of the most powerful groups can use 'equal status' arguments to support religious segregation or exemption from ES (notable in the Irish case), as much as an individual complainant with limited disposable resources. Third, the success of positive action in recent years has been limited, not least because the judiciary has often given precedence to those who are *not* covered by the positive action rather those who are, thus inverting concerns about inequity towards those who may be less in need of the protection for which positive actions were primarily intended.

According to Whyte (2006), to date there have been only three cases under the Irish Equal Status legislation dealing with education. It is noticeable that, in each, complaints of unlawful discrimination have failed. Here, we identify two of these, as reported in Whyte (*ibid*). In one case (DEC-S2003-1335 *A Parent v. a Primary School*) the parent of a nine-year old girl was unsuccessful in alleging that her daughter had been removed from school on account of her recent divorce. It was upheld that the daughter had not been removed from the school for this reason, but because of 'conflict' between the mother and the 'school management'. In a second example (DEC-S2005/019 *Ward v. Sacred Heart Secondary School*) two Traveller children were refused places in a secondary school as they had not completed primary school. The school argued that they had insufficient resources to allow this. Eventually admission was allowed, but the case of unlawful discrimination failed on the grounds that the Travellers were not being treated less favourably than non-Travellers in a similar situation.

Considering policy-induced change second:

Here, 'international research demonstrates a dubious interface between the stipulations of policy and the support systems in school... that are required if policy is to be implemented thoroughly and completely' (Gaine, 2001:117). His point is that regardless of the perceived correctness (or righteousness) of imposed change, the latter will founder if it lacks meaning for staff in education organizations. The task, therefore, of making equal status meaningful is likely to be 'almost always underestimated' (p.120). It follows that commitments to equal status will involve more than rational appraisals, needing to be rooted in emotional justification by more than 'equality activists' in schools, education services or beyond. Or, as Marris (1975:166 cited in Gaine 2001) noted:

When those who have the power to manipulate changes act as if they have only to explain, and when their explanations are not at once accepted, shrug off opposition as opposition or prejudice, they express a profound contempt for lives other than their own.

This is not to condone racism, ageism, or homophobia, for example, but recognises that some forms of 'human conservatism' (Gaine, 2001:121) demand more than exasperation as response; instead, it recognises that egalitarian change will almost inevitably generate conflict which may be especially painful (and therefore worth avoiding?) for leaders wishing to deny that 'their' educational sites are places of conflict and 'value divergence and dispute' (Gaine, 2001:123).

Given the prevalence of the themes identified in this paper, we suggest that broad path change pathways to equal status are likely to be most successful when:

- they have the sustained support of leaders (at a range of levels and organisations)
- there is pressure to initiate and implement (an important issue is how much pressure and from which sources)
- there is shared and deep understanding of the complex and multiple changes required inside and outside the organisation (among staff and students, other stakeholders, community members)
- the degree of risk and generated anxiety are recognised, and the need for support
- the ethos of the organisation and its micro-political features are researched and recognised
- the time taken for development planning and action is recognised (often years).

(adapted from Gaine, 2001)

Hopefully, this paper has provided focal points for considering challenges in translating equality principles into purposeful action in Ireland and beyond, a process already spearheaded in the Authority called Cavanagh. This needs to be long term and sustained as part of a leadership and management enterprise which is both moral and legal, yet located within economic, social and political structures that are not all of its own making. We also suggest that, at best, the legislative impulse is potentially effective only when pursued in relation to other structural and cultural changes; at worst, imposition without ownership may stiffen resentment and resolve to counter what might be seen as political 'correctness' and/or an erosion of underpinning societal values and identities, and, therefore, worthy only of surface compliance, especially where links between anti-discrimination and equality lack clarity or transparency. There is surely no 'magic bullet' to equality proofing.

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Collective Leadership of Local School Systems: Power, Autonomy and Ethics

Paper presented to the Conference of the Commonwealth Council for Educational Administration and Management. *'Recreating Linkages between Theory and Praxis in Educational Leadership'* 12 - 17 October 2006 Lefkosia, Cyprus

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Collective Leadership of Local School Systems: Power, Autonomy and Ethics

Introduction. We are all partners

The World Conference on Education for All held at Jomtien in 1990 established five underpinning principles of a global vision for education, endorsed by the majority of nations. One of the five principles is increased partnership (Shaeffer, 1992). In the United Kingdom (UK) 'partnership' is increasingly stressed in the policy discourse as a major strategy to forward the development of education. Explicitly in the title of many policy initiatives, such as, for example, *the Leading Edge Partnership Programme*, *The Learning Partnership*, *Partnership Working*, or implicitly in the terms of funding available for other initiatives such as the *14-19 Pathfinder* programmes, partnership is promoted as a major means of improving the retention, achievement and progression of learners. This paper reflects work in progress and focuses on the leadership of upper secondary education (14-19 year olds) in the UK as a vehicle to consider the theoretical and research challenges raised by the increasing emphasis on partnership.

14-19 education in the UK

In the UK there has been a broad thrust to widen and personalise the curriculum for 14-19 year old learners and to provide a more comprehensive and coherent range of youth services (Broadfoot, 1998; Hargreaves, 2003; Harris et al, 1995; Hodgson & Spours, 2003). Partnership is promoted by the Government as key to achieving these objectives. For example, one of the Department for Education and Science's core principles for improving schools is collaboration (Glatter, 2003). Consequently, a large number of schools are involved in partnerships. In 2004, in answer to a Parliamentary question, the Secretary of State for Education and Skills indicated that 70 per cent of all secondary schools in England (age 11-18) are involved in at least one formal collaborative network with other secondary schools, that is, 2391 schools engaged in collaborative arrangements, each with from three to sixty one other schools (DfES, 2004). This excludes collaboration with further education (technical) colleges and so underestimates the extent of such arrangements.

'Collaboration' may indicate a spectrum of arrangements. A range of collaborative agreements is evident internationally and in all phases of education (Harmon, 2000). In the UK, the Nuffield Review of 14-19 Education and Training Annual Report 2004/05 identifies a range of practice in England and Wales which is described as 'partnership' (Hayward et al, 2005). This includes 'harder' arrangements where a single governing body and principal lead what was previously more than one school, to 'softer' arrangements where organisations retain their autonomy but work together for particular ends. In some Local Education Authorities both formal, legally binding and informal, pro-tem collaboration is in operation. In their national review of one kind of policy supported partnership working, 14-19 Pathfinders, Higham & Yeomans (2005) suggest that arrangements differ in scale and scope along three dimensions:

- (i) the size of the geographical area
- (ii) the number and types of institutions involved
- (iii) the extent to which they addressed the full range of potential 14-19 issues or focused upon selected elements of the agenda.

These dimensions could be used to characterise the individual nature of each partnership and to map the range, including the number of organisations in each collaboration, the geographical area involved and the degree to which each is inclusive of the whole range of ability and provision or otherwise. Indications are that variation will be considerable. The context in which leadership is enacted will therefore differ considerably from partnership to partnership, but there is little doubt that the advent of partnership will consistently 'involve a qualitative difference in the relations between schools' (Glatter, 2003, p. 16).

Leadership in partnerships

In reviewing research on leadership, Hallinger & Heck (1998) identified the existence of blind spots, that is, ontological or epistemological bias resulting in the invisibility of aspects of leadership and management. This paper suggests that there is a blind spot in relation to educational leadership which is conducted in collaborative situations. While leadership has been increasingly conceptualised as emerging from numerous actors, it has been framed largely as relating to a single organisation. Principals, deputies, heads of department and teacher leaders are expected to improve practice and performance in their own school (Begley, 2004; Bennett, *et al*, 2003; Bush & Glover, 2003; Fullan, 2003). There is little research as yet which may allow assessment of how far theories of leadership constructed in relation to autonomous single institutions may be relevant to and helpful for leading within a wider collaborative framework. If increasingly single organisations are seen as inadequate to the task of providing the breadth of curriculum and services required by learners, then it will not be enough to study partnership or collaboration as a phenomenon which is divorced from school leadership. Indeed to do so would imply a particular conception of partnership as a bolt on to a school's activity, rather than the primary context within which leadership must be enacted, and therefore researched. This paper draws on evidence of interviews with young people, teachers/trainers, support services and parents from two Local Education Authorities in England and one in Wales to explore the implications for researching and theorising leadership in the new world of partnership.

Methodology

The research reported here analyses a data set comprising interviews with 218 14-19 year old learners, 80 staff and 45 parents in relation to 14-19 arrangements in two English and one Welsh Authority. The learners were drawn from 27 secondary schools, and five further education/sixth form colleges. All of the schools and colleges were involved in self-styled partnership arrangements with other local organisations, generally with the aim to increase achievement (the number of accredited outcomes), retention (staying on for further education or training after compulsory schooling age) and progression (undertaking higher level education/training qualifications). The partnerships facilitated arrangements whereby some of the young people spent a part of the week, usually a half or one day, undertaking study at a school or college other than their own. This ranged from training in a craft or trade such as construction, vehicle maintenance or hairdressing through to general occupational areas such as engineering, leisure and tourism, childcare or information and communication technology. A minority of learners spent their entire time in a learning environment other than school, despite the fact that they were of compulsory school age. Developments were primarily financed by ring-fenced government funds, for which partnerships had tendered.

Learners were generally interviewed in focus groups of between six to eight young people, though in the case of those either not in education, employment or training (NEET) or placed part-time at a work-based learning provider, individual interviews were carried out. School and college staff were individually interviewed for up to an hour. They included those with a strategic responsibility such as Principal/Head teacher and deputies, those with pastoral responsibilities such as head of year, learning support staff, and those with primarily teaching responsibilities, teachers and lecturers. Additionally some officers from Local Educational Authorities, Careers Services and local councillors were also interviewed. Parents were interviewed by telephone. All interviews were recorded to allow accurate use of quotation.

This is only one kind of partnership activity in one country, the UK. Nevertheless, it provides a useful example in order to consider the implications for leaders. The article draws on the resulting data, but its primary focus is not presentation of the data itself, but rather the implications of its analysis in terms of a conceptual frame for leadership.

Conceptualising collaboration and partnership

So far the terms collaboration and partnership have been used reflecting their use interchangeably by practitioners and commentators. Glatter (2003, p. 16) for example links them together in one term 'organisational partnership and collaboration' or OPC. Collaboration is a generic term for agreement to work together. Partnership is used commonly, and by our respondents, to indicate a more long term and extensive collaboration in intention, if not in execution. There remains however a semantic uncertainty about the distinction between the concepts. Despite the ubiquitousness of the term partnership, there remains some conceptual vagueness in how it is understood. It is used as a label for very different kinds of collaborative arrangements, and there is as yet relatively little empirical data to support conceptualisation.

Huxham and Vangen (2005), engaging with partnership across private and public sector organisations in the UK, including those concerned with children's services and education, conclude that there are three approaches to researching this area which appear most common: identifying the life stages or lifecycle of partnerships and how to support each stage, identification of attributes of a partnership and the factors or conditions which are likely to lead to effectiveness or the contrary, and finally research to develop tools to support the functioning of partnerships. Within education, the second of the three approaches has been the most prevalent (Glatter, 2003; Lumby & Foskett, 2005; Woods et al 2004). The impetus is towards description and instrumental formulae to guide practice, rather than the construction or testing of theory. Partnership is conceived as the focus of research. The conceptualisation and enactment of leadership within partnership is generally not evident or peripheral.

Emerging literature on specifically education partnerships tends to be descriptive of the variety of arrangements, identifying supposedly key factors. The most commonly described elements promoted as defining characteristics of partnership are common goals and trust (Bennett et al, 2004; Glatter, 2003; Lowndes & Skelcher, 1998). However the identification of these is often reliant on self-reported data from staff participating in partnerships; the degree to which the characteristics can be viewed as evident in current practice or as reflecting an ideal type of partnership is unclear. The data reported in this paper was triangulated by exploring the perspective not only of staff, but also of learners

and parents. The findings suggest an absence of both common goals and trust, in the three partnerships in question at least. Many of the partnership organisations have in common primarily pursuing their own organisational goals rather than any which transcend those of individual organisations (Lumby & Morrison, 2006). Neither goals nor trust could be seen as stable elements between groups of schools and colleges.

The analysis of our data from the three 14-19 partnerships in England and Wales suggest three forms of operating as discerned in staff perspectives:

- Partnership as complement
- Partnership as synergy
- Partnership as trust

Partnership as complement was reflected in the comments of staff indicating that the aim was for partner organisations to provide curriculum elements that their own school could not. Partnership was a *'bolt on'*, *'a convenience'* in the words of one respondent. In this perspective, the school is committed to using the resources of other organisations to supplement what it cannot offer itself, thereby solving difficult issues created by a curriculum ill suited to some learners and allowing retention on roll of those who might otherwise opt out psychologically or physically. The view of those who see their partnership in this way is that each school is pursuing its own individual path in its own way, but it is a peripheral convenience to send some learners elsewhere for part of their experience.

Partnership as synergy was reflected in the belief of some staff that collaboration went beyond just bolting on additional courses; that by working together the curriculum could be expanded in a way that would not otherwise have been the case. By pooling resources, rather than just attaching existing provision, new possibilities could be created. For example, small numbers of learners from two or more schools might together be sufficient to justify the cost of providing a minority subject. Collaboration involves more than merely transporting learners to another place. Some degree of mutual development of provision is necessary

Partnership as trust was suggested in the comments of staff who saw agreed values as fundamental, leading to an alignment of direction, and its enactment through common systems, for example of quality assurance and behaviour management. In this conception of partnership, it is not a question of adding disparate elements together, or working together to extend the curriculum in relatively minor ways. Rather the aim is to create one coherent system based on common values and goals to benefit all learners in a defined geographic area.

The findings of a national evaluation of 14-19 partnerships in England led to a similar typology. Higham & Yeomans (2005, p. 31) identify what they term different orientations to collaboration:

- i. Technical
- ii. Instrumental
- iii. Committed

The first two are short term responses to funding opportunities. The first is partnership in name only but with little discernible collaboration. The second describes collaboration

which influences activity short term and is primarily motivated by a desire to access the national funding available to develop partnership. Only the third, commitment, embeds an intention to work collaboratively long term beyond the period of additional funding available (Lumby & Morrison, 2006).

It would seem that partnership is an umbrella term which is used to describe a variety of ways of collaborating. If leadership is concerned with influencing direction and goals, then leadership within complementary, synergistic and trusting partnerships may be markedly different in nature. Additionally any partnership may comprise all three kinds of engagement, simultaneously, sequentially, in different degrees and may change over time. The educational leadership field has an insufficiently robust empirical base to begin exploring the implications of such complexity for leadership practice.

The evidence

This paper has not space to present in detail a substantial and rich data base. A variety of perspectives have been adopted to explore and report the data elsewhere (Lumby & Morrison, 2006; Lumby, forthcoming). Here, the major findings are summarised and illustrated in order to provide a situational context for exploring the conceptual and research implications of leading within collaborative contexts.

The staff most closely involved in supporting partnership working tended not to be headteachers or principals. While there were exceptions, in the majority of cases, a deputy or middle manager held the role of liaising with other organisations and was often the driving force. In all three geographic areas, the absence of interest from many headteachers was noted and interpreted as a negative factor in developing partnership.

While the stated aim for each of the three partnerships was to meet the needs of individual learners, practice also, and in some cases primarily, aimed to benefit the individual organisation and/or staff as individuals. For example, staff made it clear that the selection of learners to attend provision in partner organisations often reflected organisational rather than learner need. Students who were perceived as presenting behavioural problems or who were not likely to achieve success in accredited outcomes were generally selected. One focus group of young people explained the opportunities to participate in the additional courses made available through their school's partnership with other organisations. Those who '*had trouble with lessons, who couldn't concentrate or were not confident enough*' were chosen.

Staff attitudes varied and also, for some, changed over time. One member of staff of a college explained:

At the start I saw the calibre of the young people they were sending us and schools were using us as a dumping ground. The ones that are a pain in the neck in the classroom. The college is offering this programme, so let's get rid of them and send them there. So in the first year the project was used as a dumping ground for students that were seen as problems, but they did well, they did very well. So well that the schools saw the value of the programme and decided next year to send more students and those that were more able.

Clearly practice varied from organisation to organisation, and over time.

Staff motivation to participate in the partnership reflected different and sometimes ambivalent reasons. One school deputy reflected on the problems caused by some young people who wanted to attend college courses but *'who were not necessarily those who we wanted to send.'* In this school, and in the majority of others, students with a record of high academic achievement were excluded from the choice of attending a partner organisation. As one deputy explicitly noted, *'We have to meet the school targets as well as student needs.'* Therefore those students who were able to achieve accredited outcomes, gaining kudos for the school, were retained in the school whatever the choice of the learner or their need, in order to bolster examination results and the position in the league table. Parents were well aware of the use of colleges as *'dumping grounds for problem children.'* One parent protested, *'It's not right to send kids to college only to get rid of them.'*

Questioned about the benefits of the partnerships, staff identified improvements in learning and in outcomes. However, organisational improvement was also an intended outcome. Several heads of department indicated that the capacity to employ more staff and to re-equip learning areas, because of the increased funding, was a prized benefit. For example, one head of department felt the partnership *'allowed me to take on more full time staff. It has allowed me to turn a series of part time staff into full time staff and to develop a team.'* Improving the learner experience was appreciated but only if there was no detriment to existing systems. For example, one deputy felt that staff were not completely in favour of partnership if by expanding learner opportunities those school subjects which had low recruitment were put under threat. The ability of staff to continue teaching the subject they wished outranked providing what learners needed. Where new provision developed through the partnership was successful in raising achievement and progression, schools were quick to wish to replicate the success of other organisation, thereby importing success from elsewhere into their own domain and control. One school deputy articulated a common position: *'I don't like putting myself in the hands of X (the partner college). Schools have seen the brave new world and have thought we will have some of that!'*

The conclusions are that while there were examples of leaders who wished to work with others long term, to develop trust and to put learners first, these form a minority. The majority adopted an orientation to partnership which saw it as a convenient means of accessing additional funding, removing 'problem' children from the premises, and learning of ways in which they could harness skills and systems in evidence elsewhere to the benefit of their own organisation.

Leading learning

The majority of learners, staff and parents interviewed agreed that their local partnership had improved the range of curriculum opportunities. As one deputy head of a school for those with special learning needs explained, the partnership *'has very much widened the range of options. There is more scope and more variety for them.'* Taking an Authority wide view, one support professional believed *'the range of curriculum is obviously dramatically increased for particularly small secondary schools.'* The experience of and effect on learning was also perceived as very positive. One young person who had been bullied previously and had not been attending school at all, was enabled through the partnership to attend an alternative institution full time. *'I didn't wanted be a person who dropped out of school and never got any qualifications. I wanted a lot of qualifications and to catch up quickly on all the stuff I had missed and to prove that I can do it.'* The partnership had allowed her to achieve her goals.

Many of the learners participating in provision made available through partnership had shown spectacular learning (Billet, 1998); their interpersonal skills, self-esteem and

engagement with learning had shown dramatic improvement, noticed by the learners themselves, staff and parents. The delight of one parent whose son was undertaking a new programme which was possible because of the partnership, is typical of many:

He studies in small groups at school and gets a lot of support from tutors and peers. Teachers are to monitor his progress, encourage him, give him a feel good factor, boost his self-esteem and make him feel confident. He's learnt a lot. Whatever way they're teaching him, they're giving him a lot of information and he's using it well. They've opened the world for him.

The evidence is mounting that partnerships can considerably improve the experience of learning, the personal growth and the achievement of young people (Lumby, forthcoming; Higham and Yeomans, 2005). This being so, there is a strong case to consider that educational leadership of learning should be conceived as a responsibility across organisations, rather than just within one school.

The boundedness of current leadership

(Stanton, 2003) defines a tertiary system as:

one where a number of post-16 providers take collective responsibility for the achievement and retention of the whole 16-21 population in an area, and where no one institution is allowed to succeed at the expense of another by not contributing to the progression and support of some groups of learners.

This benchmark might be used as a means of assessing partnerships, including those for a wider age range, most of which state in their aims an intention to work together to improve the experience and outcomes of all the young people in the member organisations. Such activity would match a definition of educational leadership as shaping all forms of resource into a context which supports learning. The evidence suggests that, at least in the three Local Authorities in question, collective responsibility was not a reality and that the impetus to succeed at the expense of one or more other organisations remains strong. Whatever the publicly stated vision and intention of the partnership, in practice leaders were overwhelmingly functioning in a mode which conceived of their leadership as bounded by the interests of their own organisation.

Placing leadership in partnership

Spillane et al (2004, p. 4) assert that:

to study leadership activity, it is insufficient to generate thick descriptions based on observations of what leaders do. *We need to observe within a conceptual framework if we are to understand the internal dynamics of leadership practice.* (Original emphasis)

One such framework which might be helpful in relation to leading within partnership is distributed leadership. The latter recognises leadership as a construct of the interplay of leaders' thinking, behaviour and the situation within which they function (Spillane et al, 2004). The concept also conceives leadership as a phenomenon which is discernible not in a single individual but in the complete picture of all those who interact to influence goals and take action to achieve them.

How the thought, behaviour and situation interact, how the activity of disparate individuals constitutes leadership has been subject to considerable theoretical analysis. Lumby (2003, p. 284) suggests:

The distribution of the different aspects of leadership through the different responsibilities and tasks undertaken by people could be seen as deliberately engineered by the principal and senior staff, or the result of negotiation, or evolving ad hoc through the march of day-to-day activity.

The alternatives presented are reflected in Gronn's (2003, p.35) two different conceptualisations of distributed leadership: as the aggregate of multiple actions and as concertive action. Distributed leadership as aggregation of many peoples' efforts does not imply that school staff are enacting leadership any differently to prior times when heroic, individual leadership was the focus of attention. Rather the lens of observation has changed to discern and take account of the activity of more people, the actions of whom may influence the vision, direction and success of the school. Leaders who were previously invisible have become visible. There is not necessarily any implication that the action of many is aligned. Rather leadership will be the sum of the activity of various people, who may or may not be pursuing common goals.

In contrast, distributed leadership can also be conceived as at least attempting some degree of alignment in the multiple activities: in Gronn's term (2003, p. 35) 'concertive action'. Gronn (2003, p. 35) identifies at least three forms of concertive action:

First there are collaborative modes of engagement which arise spontaneously in the workplace. Second, there is the intuitive understanding that develops as part of the close working relationships amongst colleagues. Third there are a number of structural relations and institutionalised arrangements which constitute attempts to regularise distributed action.

Whether distributed leadership is conceived as aggregate or concertive, its analysis habitually refers to leadership *within* the organisation; the school is taken to be the boundary of the situation which influences leadership. For example, there is recognition of 'interdependence... the extent to which tasks can be differentiated and performed separately by individuals acting in concert, or whether tasks require more than one person to complete them' (Gronn, 2003, p. 18). However this acceptance of the multiple elements of tasks and multiple people required to undertake them remains bounded by the historic view of the structure of education, as comprising single schools functioning autonomously.

An alternative slighter wider view is apparent when assumptions are made that leadership relates to the school community, but community is understood in limited terms. Bamberg (2003) offers two alternative understandings of the word. Firstly she argues that community can imply a range of individuals, groups and organisations who are in some way linked to a school, even when geographically distant. An alternative is to see a community as a location, the local people in the context of the structures, history, and economy of the area surrounding a school. Rose (2003, p. 49) adds a further level of meaning in suggesting that:

A community implies a network of shared interests and concerns, with communities categorised in a variety of ways, for example in relation to geographic areas (e.g. villages) ethnic and racial groups, religious groups.

Schools may relate to multiple communities, primarily those families who have children in the school, but perhaps also local employers, religious groups and schools with which they have interests in common, for example feeder schools. The location surrounding the school frequently has priority. If leading within a partnership implies working for the good of *all* learners within the partnership, the community to which each leader relates is wider than the historic concept of a school community. For example a faith school might draw its students from geographically dispersed locations and see its community as primarily those of the faith in question. Leading within a partnership would impel a moral commitment to the wellbeing of a wider community than the school's own pupils and those of one faith. It would demand an orientation to all the young people in the geographic location of a partnership, such as a Local Authority, whatever their faith. Similarly, 'serving the community' could not be taken to imply service to those in the school's catchment only, but rather the wider geographic location of the entire partnership.

Theories of distributed leadership, while they engage with how we understand the construction of leadership, are silent on its purpose. If leadership is taken to be a moral endeavour to enhance the experience, achievement and life chances of learners, to which learners this relates becomes a crucial question. If distributed leadership is to be related to leading within partnerships, leadership *across* organisations and *with* other organisations has to be integrated into the conceptualisation. The situation which influences leadership would be defined more widely, not only as the school and its immediate community, but as the system of all provision within the partnership. This goes considerably beyond previous explorations of leading within a competitive environment. It demands reconfiguration of the environment of learning. Competition may still persist, but between partnerships rather than between members of a single partnership. While this might be an ideal type and difficult to achieve, it serves the purpose of an ideal: that is, to provide a benchmark and goal against which to measure development. If practitioners, policy makers and researchers persist in conceiving of the arena of leadership as a single institution, then they will neither reflect the reality of developing practice, which is increasingly collaborative, nor break from the current embedded competitive orientation which may work to the detriment of learners.

Linking distributed leadership to partnership

How then do alternative conceptualisations of distributed leadership relate to leading within a partnership? Aggregate leadership is powerfully descriptive of the nature of leadership in the three partnerships in question (Lumby, 2003). Leaders generally pursued goals in relation to their own or their organisation's interests. There was not necessarily alignment. Leadership was also usually not overseen or directed by the headteacher/principal. Leadership, in any case, escapes the control of any individual, even the principal. The latter may delegate, but leadership can be enacted by those who have no formal leadership role as well as those who have a formally designated role. Lumby (op cit. p. 284) builds on Morgan's metaphor of a hologram to communicate the instability and constant metamorphosis of leadership:

Morgan's (1986) early description of leadership as a hologram created by the light shed from a number of sources to create a whole is a metaphor which moves thinking away from the concept of an heroic individual leader, but is by now too static. We have reached a conception of leadership (as)...not a stable, but a shifting hologram.

While supporting the partnership may be formally delegated to one or more individuals, leadership of the partnership will not be confined to them. The vision of the partnership and its enactment are the product of a community consisting of several, sometimes many educational organisations which are likely to be more diverse than any one organisation. Within the multiple motivations, predilections and abilities of the many distributed leaders, the tug of individuals' personal and organisational goals will be strong. Distributed leadership within partnership, if conceived as an aggregate, may offer an explanation of the instability of partnerships. The multiples of leadership within the aggregation are greater, more diverse and focus in two directions: that of the home organisation and that of the partnership.

This being the case, the necessity for alignment or concertive action is all the greater within a partnership. However, partnership provides fewer opportunities to facilitate concertion than a single organisation. Gronn's first two forms of concertive action are limited in relation to leadership within a partnership. Individuals working in different organisations have less frequent opportunities to meet. Not only are they physically working apart for most of the time, developing close understanding may be inhibited by the different cultures and vision of the member organisations. The kinds of task which underpins 'stretching' leadership (Spillane et al, 2004) over numerous activities and people are exemplified by Gronn: budget meetings, staff appraisals, ad hoc crisis meetings to solve specific problems. Some of such activity takes place in a partnership but is less frequent. It also involves a more limited number of staff (as a percentage of the overall number of staff in the partnership) and is perhaps less intense. Crisis in the partnership will not be viewed as threatening in the way that crisis in the school may be. The former may lead to the demise of the partnership; the latter could lead to the demise of the organisation and therefore the individual's job and livelihood. Concertive action which relies on proximity, spontaneous response to circumstance and the daily communication which builds shared understanding of a common culture is constrained in partnerships.

The third form of concertive action, structural relations and institutionalised arrangements is based on collaborative units, categorised by Gronn into formal and informal units. As he points out, single organisations which are multi-site have the challenge of achieving concertive action across space and time when members of formally constituted planning or management groups cannot physically meet often. He argues that the effectiveness of such groups depends on their 'consciousness of their 'groupness'' (Gronn, 2003, p. 36). If staff are part of a meaningful group which amounts to more than just a number of people but has an identity and purpose, they may function effectively in contributing to leadership. Partnerships are problematic in this respect. Any individual member of a group is likely to feel a strong identification with his/her own school, and/or department. The data reviewed suggest that this generally overwhelms identification with the 'groupness' of the partnership.

Leading for learners

This brief exploration of the interrelationship of theories of distributed leadership and leading within partnerships has highlighted the disparity between previous research which generally looks inward at the school and the increasingly common context of leading in a situation which transcends single institutions. The moral endeavour of educational leadership cannot be to knowingly enhance the learning and life chances of some students to the detriment of others. Despite this, the competitive context within which many UK schools function exerts a pressure on leadership to accrue benefits for one's own school, even at the cost of harming another. In pragmatic terms, in that an increasing number of schools work within partnership, and in ethical terms, to ensure leadership takes equal account of all learners and not just some at the cost of others, the unit of analysis of leadership must be greater than a single institution.

If distributed leadership is therefore to be analysed within wider parameters, in relation to a partnership, then much evidence to date suggests that leadership is failing. Schools persistently promote their own interests to the detriment of others and sometime organisational interests take precedence over those of learners. Putting learners' interests first has become something of a mantra in the UK. Our evidence, and much evidence from elsewhere, suggests that it is a posture rather than a reality and that individual and organisational needs and wants often take priority (Ball et al, 2000; Lumby & Morrison, 2006; Schagen et al, 1996). There are of course reasons for leaders adopting this stance which the paper has not space to explore in full. Market forces and more profound social and psychological imperatives propel individuals, families and schools towards competition and opposition. At the same time, the insistence on partnership demands cooperation and mutuality. The quasi market which has evolved in response to increasing school autonomy continues to maintain a competitive environment where succeeding at the expense of other schools is explicitly seen as acceptable (Gorard, 2000; Hemsley-Brown et al, 2002). The strategy applauds the closure of 'weak' schools and the growth of the successful, viewing schools as abstract organisations, not as groupings of learners who may be considerably harmed by such processes.

If, as this paper has suggested, leadership is essentially a moral endeavour, two ethical premises underlie analysing and assessing leadership in relation to a collaborative environment:

1. The needs of learners should take precedence over staff and organisational interests.
2. No school should plan to succeed at the cost of detriment to another thereby creating detriment to another organisation's learners.

A number of questions follow. How could leadership be conceived and enacted if it assumes a community wide obligation? How might leadership differ if its goals relate to a group of organisations which constitute a partnership rather than to individual organisational goals? How can internal and external rewards be reframed to encourage partnership working? What conceptual frameworks might support reflection for action? As yet we have no empirically based answers to these questions. School leadership and partnership leadership are generally researched independently as two dissociated phenomena. This paper has done no more than raise questions. There is considerable work to be undertaken if the research blind spot of partnership leadership is to be

obliterated and the conceptual lens of distributed leadership be adjusted to include the full context of current school leadership.

Acknowledgements

Research team members included Professor Stephen Gorard and Dr Emma Smith of the University of York, Dr Gwyn Lewis of the University Bangor, and Anthea Rose, Dr Kenneth Tangie and David Middlewood of the University of Lincoln.

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