

Davies and Howes, 2005: inclusion and participants' theories of change

## **What difference can we make, and how? Interpreting the challenge of inclusion in secondary schools in England and Wales through participants' theories of change**

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### **Abstract**

If schools are to become more inclusive, practitioners need to engage with the assumptions that underpin their practice, and often the school culture as a whole. This is particularly challenging in the large and complex organisation of a secondary school. An examination of the literature finds that there are many reasons why teachers engage with, or resist, educational change in general and the development of inclusive practice in particular. Whether at the level of the individual teacher, or the departmental or pastoral group, becoming more inclusive requires a critical perspective on current practice and can sometimes appear threatening or irrelevant in the light of other priorities.

The ESRC TLRP Project 'Prosiect Dysgu Cydradd' is co-funded by ESRC and the Welsh Assembly Government, and provides an opportunity to learn more about these issues in the comparative contexts of Wales and England. The project will explore the factors that influence teacher engagement in structured reflective practice towards more inclusive learning for students. Existing groups of secondary school teachers (in departments, for example, or pastoral groups) in schools in Wales and England will engage in a collaborative action research project in the area of pupil attitude, behaviour and learning. Further developing a systemic rather than individual pupil-focused role in schools, educational psychologists will play a key role in facilitating this process. The affordances and hindrances to teacher engagement will be monitored and an evaluation will be made of the effect of teacher engagement on student learning.

This paper discusses theory of change methodology, and how the project will be using this to enhance its exploration of factors that influence how teachers' change and develop their inclusive practice. It will present, using this framework, some of the early analysis of data gathered from teacher questionnaires and interviews with key stakeholders. This begins the process of trying to understand the factors that influence teacher engagement in making changes in their practice to develop inclusion

### **Introduction**

This paper is an exploration of the challenges facing secondary schools in becoming more inclusive, making use of the theories of change that participants in that process hold and work with. The arguments presented here are contextualized in the ESRC TLRP Project 'Prosiect Dysgu Cydradd', co-funded by ESRC and the Welsh Assembly Government, which provides an opportunity to learn more about these issues in the comparative contexts of Wales and England. The project aims to explore the factors that influence teacher engagement in structured reflective practice towards more inclusive learning for students.

Our starting point is that inclusion constitutes a radical challenge to schools and school systems – and one that is increasingly essential. Inclusion is an element in an education which opens the world to children, rather than offering a restricted and partial view:

'The question of the openness of curriculum and the reach of reason can be quite central to the role in promoting human security. If the schools fail to do that by 'thrusting smallness' on children, we not only reduce their basic human right to learn widely, but also make the world much more incendiary than it need be' (Sen, 2002, p.7)

Allan (2003) looks at barriers to inclusion in the context of two state policy initiatives (in Australia and Scotland) in which the inclusion of all children was really at issue, and concludes:

'I have argued here that barriers to inclusion extend beyond school systems and include ways of knowing (special education); ways of learning (to be a teacher) and ways of working (within accountability regimes)' (p. 178)

Allan's (ibid.) analysis of barriers helps to suggest why inclusion in secondary schools is generally a greater challenge than in primary schools in England and Wales at this time. Competition between secondary schools, particularly in urban areas, adds power to accountability regimes; the pupil differences which fuel the demand for special educational provision are greater at secondary age; and teacher roles are less connected with parents and more oriented to subject demands. Although these features do not have to act as barriers they can create conflicting tensions when trying to develop greater inclusion. Allan (ibid.) suggests that it is of value to explicitly articulate these 'double edged responsibilities' and poses them as a series of reflective questions. For example:

'How can teachers be supported in maximising student achievement *and* in ensuring inclusivity?... What assistance can be given to teachers to enable them to deal with the exclusionary pressures they encounter *and* avoid becoming embittered or closed to the possibilities for inclusivity in the future?' (ibid,p.177)

This emphasis on the recognition of tensions echoes the analysis of Dyson and Millward (1999). Based on in-depth study of four secondary schools, it highlighted the dilemmas that those schools dealt with and the ambiguities of their practice in relation to notions of inclusion. Many other commentators and researchers have testified to the challenges that secondary schools face in becoming more inclusive. Avramidis et al (2002) studied a school recognised to be inclusive by its LEA and found that 'participants were enculturated into the integration model' and that there was at least some evidence of the social exclusion of 'included students', indicating the need for 'restructuring of the physical environment, resources, organizational changes and instructional adaptations' (p.143). After a consideration of the responses of some secondary schools to competing agendas of standards and inclusion, Florian and Rouse (2001) suggest that inclusion should be taken to mean meeting 'the dual criteria of enrolling a diverse student population and improving academic standards for all' (p.399) – which is a pragmatic definition but one that offers little in the way of support for resolving the tensions involved. Carrington and Elkins (2002) describe the complexity of translating inclusive policy into culture in a secondary school, which for participants included 'collaborative problem solving, inclusive beliefs, commitment to reflection, vision and change, and planning and teaching for diverse learners' (p.51).

This brief review of the challenges posed by delivering inclusion reinforces the significance of continuing teacher learning and professional development. Kwakman (2003) identifies three different accounts of teachers' learning behaviour – collaborative, individual, instructional (p.162-3), as perceived by teachers themselves. Her conclusion is that:

'... interventions have to be directed specifically towards designing the working environment as a learning environment for teachers. Such interventions do not address particular learning events organized by staff developers, but concern structural and cultural changes within schools that provide time and stimulus for those activities that are characteristic of strong professional communities, such as interaction and reflection (Hargreaves, 1997). So, it is strongly recommended that researchers and staff developers collaborate with schools and teachers in jointly designing and creating those interventions and in investigating their effects.

Only when we know more about how these interventions affect learning will we be able to judge the potential of teachers' workplace as a setting for learning.' (ibid, p.168).

'Structural and cultural changes' in schools are not straightforward to bring about, but as we will see, there are people within our project schools with the sense that such changes are necessary. Action research is seen as an approach that may lead to such changes – and later we will further explain our theory of how this may occur.

### **A theory of change approach**

A theory of change approach requires participants to consider and describe how change will occur after an action or intervention, including a description of the issue or problem, key steps in the action/intervention, short term and long term outcomes (Connell & Kubisch,1998). Participants are asked to make predictions about the change that will occur as a result of an action or intervention. In this, the approach bears close similarity to a hypothesis or research question. Where it differs is that participants in the process are encouraged to speculate about a chain of events that follow from an action. It is attempting to think through the complexities of a chain of consequences to a long term objective that enriches the participants' understanding of how and why an action should be taken.

The approach then goes beyond the specification of inputs and outputs, to focus attention on what actors and participants believe about the process of change. There is an assumption that the 'components of a program' are rooted in 'underlying mechanisms' (Sridharan and Lopez, 2004 p.136) and that understanding these is essential to achieving the intended outcomes in complex systems:

Program logic often specifies the inputs and components of a program, as well as short-term and long-term outcomes, along with the assumed linkages among these. However, program logic rarely outlines the underlying mechanisms that are presumed to be responsible for those linkages. In contrast, Rogers et al. (2000a:5, 2000b) see a program theory as an explicit theory or model of how a program causes the intended or observed outcomes. (ibid p.136)

In practice, the process of establishing participants' theories of change usually begins with an interview.

Initial interviews with practitioners can elicit programs' theories of change as well as both the explicit and implicit logic of an intervention design. This includes how they: 1) frame the specific problems to be addressed; 2) frame their intervention goals; 3) identify processes through which change happens; 4) describe their strategies, principles and specific methods for intervention; and 5) delineate short- and long-term intended effects. Graphic representations and written descriptions of these practice and change frameworks can help clarify the relationship between categories. (Shapiro, undated website [http://www.beyondintractability.org/m/theories\\_of\\_change.jsp](http://www.beyondintractability.org/m/theories_of_change.jsp))

Inherent in such an interview process is the idea that participants' theories of change often contain ambiguities and untested assumptions. This is suggestive of the formative value of the theory of change approach, as a step in the formulation of better-considered interventions which have the support and deep commitment of many actors.

After an initial mapping, facilitators should focus additional questions on clarifying ambiguous meanings, connections, and inconsistencies, as well as explore the reasoning that leads program leaders to their inferences about how change happens. Descriptions and mapping should be reviewed by program leaders often so that they provide detailed feedback to be used in correcting and refining the description. (Shapiro, undated website [http://www.beyondintractability.org/m/theories\\_of\\_change.jsp](http://www.beyondintractability.org/m/theories_of_change.jsp))

The intention within the current project is to use the theory of change approach as a tool both to facilitate implementation of change, and to analyze the effect of the interventions. Theory of change can provide insight at a number of levels. Elicited prospectively, that is before and during the change process, it can facilitate a greater depth of understanding for each participant, and it can also make explicit differences that exist between participants. A change process in school is likely to involve many participants, and the perception of how change will occur can, and most likely will, vary between those involved. However, change is often more effectively accomplished if all participants are agreed on a similar route to change. Greater commonality can be achieved by working towards a shared theory of change.

A further function of the theory of change is to plot the progress of the actual change process and compare it with the participants' prospective theories, which will suggest explanations which will contribute to an understanding of the effects of the various components of interventions. The problematic attribution of causality in the context of change in complex social situations is improved where those involved have justified predictions about how and why change will occur.

### **Assessing the strength of a theory of change**

A theory of change that has high *explanatory* power (ie. in the sense of a theory that assists in analysis of interventions) provides a mapping of the change process, offering explanations of how, and perhaps why, change will occur in a particular way. As a starting point, a theory is more likely to be powerful if the issues that underlie the problem are not accepted at face value but are interrogated. It is important to distinguish the problem from just 'what's wrong'. For example, 'the pupils are inattentive and poorly motivated' is a description of *what's wrong*. But to further define this observation using an inclusive perspective and to understand the *problem* would be to interrogate issues relating to underlying mechanisms, for example the teacher's methods, the school's organisation and pupil / teacher relationships. Inclusive education involves a systematic attempt to interrogate what's wrong, rather than implicitly casting blame at the most obvious source (Booth, Allan).

A weak and underdeveloped theory of change often consists of hypothesized connections between the activities or interventions and the outcomes, but without sufficient focus on the context or the mechanism by which these connections are made (Pawson and Tilley, 1997). In this sense, stronger theories of change are more detailed; they outline the steps in the theorized change, and so offer a greater degree of explanation for that change. The establishment of a strong theory or type of theory offers the possibility of effectively bringing about similar changes in future by adopting a similar process.

A theory of change which is *formatively* strong (in facilitating effective change) needs to be increasingly widely shared if it is to have any relevance. As already mentioned, social change requires participation and a degree of agreement on possible and desirable actions, and theories of change are one way of generating such agreement. One of the ways in which a theory becomes widely shared is if it has the power to persuade. It is clear then that this element of a theory's strength is linked to its explanatory power – a powerful explanation is persuasive. But there are other ways in which a theory can be persuasive. For example, it can be aligned with preexisting powerful discourses, which may be widespread, such as the move towards measurement to strengthen accountability in educational change of all kinds, or which may be widely shared local discourses.

At a practical level a theory needs to be 'doable' and 'testable' (Connell & Kubisch, 1998) There must be the resources and skills available to carry out the strategies planned and the theory needs to be sufficiently specific and complete so that progress can be evaluated.

It is worth considering the extent to which teachers habitually work with theories of change, or to which this is an atypical form of thinking for most. Some scholars have argued that some, if not most, of teachers' knowledge is situated within the contexts of classrooms and teaching (Carter, 1990; Carter & Doyle, 1989; Leinhardt, 1988). Carter and Doyle, for example, suggested that much of expert

teachers' knowledge is *event-structured* or *episodic*. This professional knowledge is developed in context, stored together with characteristic features of the classrooms and activities, organized around the tasks that teachers accomplish in classroom settings, and accessed for use in similar situations'. (Putnam and Borko, 2000). Insofar as this is the case, then when teachers are asked to describe their theories of change, they will be constructing a description of their intentions and practice in relation to their expectations and perceptions of issues.

### **Our theory of change**

As researchers we are mindful that we are participants in a change process and have our own theories about how change might occur in the schools with which we are working. At a relatively general level, our theory is that for schools to become more inclusive, practitioners need to engage with the assumptions that underpin their practice, and often the school culture as a whole. Action research will provide a tool for practitioners to reflect upon and change their practice; and to evaluate the differences that these changes bring about.

Becoming more inclusive means unpacking and taking a fresh look at much of the familiar baggage of methodology and practice that creates interaction and learning in the classroom, and in the school. How this baggage has been used and re-used over the years will vary between teachers and classrooms, but inevitably many of the practices of teachers and departments will be relatively unexamined and taken-for-granted. There are some structurally-related similarities between schools, but there will also be a unique combination of features for each teacher, classroom and school. In consequence, making changes in order to be more inclusive can be both technically but also personally challenging for the teacher (Howes et al., 2004; 2005). It may involve for example, being self critical, questioning attitudes and values, learning new skills, changing the relationships and dynamic of the classroom.

Recognizing this complexity, teachers cannot make these changes by being guided in the abstract or through particular, externally imposed frameworks. However, action research is a methodology that is available to the teacher that can handle these challenges (Armstrong & Moore, 2004):

'action research is a necessary development to assist teachers and schools in coping with dynamic developments, divergent demands and complex practical situation' (Posch, 1994)

Other authors have emphasized the characteristics of action research that make it attractive to practitioners:

1. It invites the practitioner to stand back from the 'dailiness' of school life; (Wideen & Andrews, 1987, cited in Haggarty and Postlethwaite, 2003) to do something different and to evaluate the effectiveness of this change.
2. It is geared to the practitioner's own practice and based on information gathered by themselves (Ponte, 2002).
3. It provides a methodology, the cycle of action research, for ongoing reflection, change and improvement (Armstrong, 2004)
4. It makes use of methods that address the social complexity of the effects of the action that is being investigated by taking note the perspectives of others. This may mean the inclusion of pupil voice or the collaborative involvement of other colleagues (Ainscow, 2003)

In this project, existing groups of secondary school teachers (in departments, for example, or pastoral groups) in schools in Wales and England will engage in a collaborative action research project to improve pupil attitude, behaviour and learning. They are being assisted in this by the school's educational psychologist who will facilitate the process using support materials entitled 'Becoming more inclusive' (Howes et al, forthcoming). Further support will be offered by the participating schools networking on an occasional basis to share and learn from each others experiences.

Expected short term effects include an improvement in the achievement and school experience of the pupils targeted by the action research. As a consequence this might be expected to impact in a broader way into the participating teachers' practice – and we are particularly interested in the effect on teachers who are relatively uncommitted and disengaged from the area of inclusion. Longer term consequences might be to add to the school's resources for developing a more inclusive culture, one aspect of which will be to sustain the change in teachers' attitude towards less engaged and underachieving pupils.

### **Theories of change of significant actors**

Given our own theory of change, and our understanding of the value of an action research-orientation, the nature of the theories of change articulated by those most centrally involved in this work are , for they form a key part of the context in which the projects in schools will be developed and carried out. Our abilities to be effective as agents for change are influenced positively and negatively by the multiple layered contexts of our lives – contexts that shape our personality, attitudes, skills, experiences, opportunities. The teacher's classroom experiences are nested in and being influenced by the school context; the school context is nested in and being influenced by the LEA context (and yet it would be wrong to assume that the LEA was not influenced by the schools' context – there is evidence of nesting in both directions). Examining the theories of change of key players in these contexts can help us understand whether contextual influences pull with or push against the changes teachers wish to make in order to become more inclusive. Through their interventions in schools, and through the structures that they operate, LEA officers have an impact on the context in which change in schools takes place. So it will be important to ask, for example: are LEA staff concerned with rescuing teachers, bringing them on board, skilling them up (Allan, 2003), and changing their points of view? We also consider that the comparison of different actors' theories of change may be illuminative – so we may look at the comparison of LEA officers' theories with those of headteachers, for example.

Spillane (2002) has done some interesting work on the theories of change of district education officers in the United States, in relation to teacher development. His analysis builds on significant ethnographic data and offers a description of three broad perspectives - behaviourist, situated, cognitive - in terms of officers' beliefs about teaching and learning, the curriculum, and motivation. The 'behaviourist' approach is typified by passive reception of knowledge by the learner from an expert,

'Knowledge was treated as a commodity that could be deposited in the minds of teachers through demonstrating and telling' (p.387)

This is in contrast to the 'situated' perspective in which learning is more active and grounded in it's socio-cultural context,

'Knowledge is not so much a commodity imported through the words and deeds of experts but constructed in part through reflection and thinking enabled by peers about their practice and guided by the ideas and questions posed by experts' (p.393).

The 'cognitive' approach views learning as the reconstruction, rather than passive assimilation of new knowledge but does not regard the social context as crucial.

His findings indicated that the 'behaviourist' approach was most prevalent and adopted by most district officers, a minority follow a 'situated' perspective and only one was in the 'cognitive' category. Indeed, the 'behaviourist' approach accounted for the perspective of 85% of district education officials in their articulation of thinking about teacher change. This was characterized by transmission of information, fragmentation of curriculum and extrinsic motivation. Spillane (ibid.) tentatively concludes that this emphasis on 'behaviourist' approaches is a product of societal assumptions about the nature of teaching and learning and also of the fragmented nature of the officials' own work:

'most district change agents had a variety of responsibilities, including grant writing, procuring curricular materials, organizing and carrying out professional development... Enabling teacher change and teacher learning was never the sole responsibility of these district change agents'. (p.410).

He then shows that the implementation of change is much higher in the minority of districts where the officials adhere to a 'situated' perspective. A school principal working in this way was cited:

'you enable teachers who want to change, putting them in a position where they can do that,... moving them with a group of people that will go with them... it's almost like an art form' (p. 391).

Significantly, Spillane (ibid) was able to ascertain that of these two broad approaches, it was the 'situated' approach that was consistently the most effective in supporting effective and sustainable teacher change.

### **Preliminary interpretations of participants' theories of change**

Data generation in the first term of the project has focused on establishing the initial perspectives and expectations of some of the key actors and participants. Participating teachers' views have been sought through questionnaires and focus groups; an LEA officer and the headteacher (or representative) of each school has been interviewed, and the views of educational psychologists have been sought using focus group interviews.

Our assumption is that the process of giving questionnaires, and conducting interviews, has started to focus participants' thinking, and also given a sense that their perspectives have been recognised and heard, thereby contributing some legitimacy to them. But we are also aware that for practitioners, the difference between empowered reflection on practice on the one hand, and the scrutiny of those in power on the other, is paper-thin. This being the case, we cannot legitimately claim that we have straightforward access to initial views in the interview and questionnaire data that we have assembled. We see in much of the data the influence on participants of their need to be seen to be saying or writing the right thing, in respect of those to whom they are accountable. Perhaps particularly at the level of the LEA, participants feel the need to be cautious and to make sure that the organization they represent comes across in a good light. At the same time, we did what we could to establish our involvement in a way that is not part of the accountability agenda, assuring participants that we would maintain confidentiality. In the case of questionnaires we made sure that the responses were not seen by anyone at the school, nor indeed by the EP team, but only by university staff.

The first stage in developing a theory of change is to explore the issue which creates the need for change. This means a close examination of the meaning of this issue for each participant. The meaning will not be the same for each person and will be constructed from the individual's own experience and interpretation of the world in general and the issue in particular.

### LEA officers' theories of change

This section contains some preliminary analysis of data from interviews with LEA officers. Some of the basic characteristics of these six Local Education Authorities (LEAs) are provided in Table 1 as part of the context for this data.

**Table 1 Characteristics of Local Education Authorities**

LEA code	Pupil population	Geographical background	Pupils entitled to free school meals(%)	Pupils on the SEN register(%)	Pupils from ethnic minority background(%)	Notes, Developing organisational features
LEA 1	27700	Predominantly rural	15.4	23	0.9	Families of schools; Resource bases
LEA 2	19584	Predominantly rural	14.1	23	0.9	Teacher for inclusion
LEA 3	133000	Rural urban mix	11.1	4.12 (statemented children only)	3.1	District multiprofessional support teams
LEA 4	41300	Predominantly urban	15.1	4.0(statemented children only)	4.1	
LEA 5	36493	Predominantly urban	20.2	20	2.2	
LEA 6	10583	Predominantly rural	10.8	27	1.4	School clusters

#### *Framing the issues and outlining goals for change*

Most of the LEA officers defined inclusion more broadly than special needs, but in terms of the actual inclusion-related initiatives they described in interviews, focused very largely on SEN. There were some particular issues of context, so that (for example) nearly all of the Welsh LEA staff said that gay and lesbian inclusion was an issue, which may have reflected a tragic and recent local case, widely reported, of an allegation of homophobic bullying contributing to the suicide of a pupil.

For example,



The **LEA 2** officer tended to identify the problem as needing to have more inclusion. They appeared to have no joined up plan for bringing this about, but instead were working with a wide range of initiatives. The approach seemed to be to launch a multitude of rather focused initiatives, with the hope that the sum total is more than the sum of the parts.

The inclusion policy in **LEA 3** is mainly about SEN. The policy aims to ensure that all pupils with SEN *who can benefit* are educated in mainstream schools in their locality. The problem is that there is a gap between the policy and the way that it's interpreted on the ground. There is great variety in schools, in terms of their inclusivity.

As with the majority of the six LEAs with which this analysis is concerned, the inclusion policy in LEA 3 is mainly about SEN. The policy aims to ensure that all pupils with SEN *who can benefit* are educated in mainstream schools in their locality. The problem is that there is a gap between the policy and the way that it's interpreted on the ground.

There is a problem with the attitude of some schools: a view that you sometimes hear is that EBD pupils and others 'need to be somewhere else'. Parental preference is seen as a significant issue, so that in reality it is not only LEA that is the determinant of placements. Parents generally want their children to be happy. The LEA sometimes opposes what parents want - but it can feel like 'standing on a sand castle with the tide coming in' – inclusion in some cases appears to be quite insecure and unstable a practice. In relation to headteachers too, the LEA is not particularly powerful.

The LEA's power to change is limited. It can offer 'grand ideas' about inclusion and how it should be operated, and power through funding mechanisms. But for example, heads currently have a lot of power to exclude, reflecting the current political priorities.

In terms of provision of support, there was a major reorganization in 1991 into multi-disciplinary district teams, with the aim that schools would not have to access a whole set of disconnected services. The LEA provides training for schools, and works with schools on support for particular individual pupils. There is a panel which sits to consider statements and associated provision. The emphasis though is on being pragmatic, and solving problems, rather than adhering to a strict policy.

One of the big changes made is to reduce the number of statements. Schools were told, effectively, here's the money, get on with it. The LEA keeps a proportion, for the low incidence of children with really high level of need. But there is currently no system in place to look at how schools are spending this money.

In **LEA 4**, issues of SEN provision dominate the inclusion agenda. The problem is seen to be that the vulnerability and marginalisation of young people are insufficiently powerful drivers of service allocation, so that parents with the abilities to argue for and get resources for their children tend to receive more than parents without such abilities. There is currently relatively little fluidity in SEN provision; lots of delegated resources to mainstream but with little accountability. In addition, there is seen to be insufficient capacity in some aspects of support, such as language and communication needs, and gaps in provision for older pupils seen as 'disaffected'.

Schools in this LEA have significantly different capacity to cope with pupil diversity – with the result that pupils tend to be directed towards those schools that are better equipped to deal with them. Statementing continues to use the skilled resources of EPs to little direct effect.

**LEA 5** statistics suggest that only a very low percentage of children (0.4%) are not in mainstream provision. The emphasis from this LEA is on the need to address teachers' awareness and attitudes.

*Comparison between LEA officers' definitions of problem / issue*

These LEA officers all emphasise the need to influence schools to become more inclusive. Ways of achieving this vary – with some emphasizing work on teacher development, changing attitudes and behaviours, whilst others emphasise the power of funding arrangements and systems of monitoring and accountability.

Most of these LEAs are focused largely on SEN when they consider the potentially broad issue of inclusion. Some of them do seek to address a much wider range of issues of marginalization and underachievement in their pupil population as a whole, finding it difficult to do this in a coherent way.

### Headteachers' theories of change

For the purposes of this paper the data from teachers from six schools is available for analysis. The basic characteristics of the six schools are shown in Table 2. The school code corresponds to the LEA code, for example, School 1 is in LEA 1.

**Table 2: Characteristics of schools**

School code	No. of pupils	Catchment area	Language medium	Pupils entitled to free school meals(%)	Pupils on special needs register(%)	Pupils from ethnic minority backgrounds (%)
School 1	1000	Semi-rural	Bilingual* – but English mostly spoken	10.3	17	1.6
School 2	900	Semi-rural	Bilingual* – but Welsh mostly spoken	7.6	11	0.2
School 3	1044 (exc. 6 <sup>th</sup> form)	Suburban	English	Missing data	3.7	16.0
School 4	1028	Urban	English	13.8	27.1	0.1
School 5	1800	Urban	English	5.3	12.3	5.0
School 6	600	Semi-rural	Bilingual* – but Welsh mostly spoken	1.6	34	2.3

\*Bilingual in this context means Welsh and English languages.

However we are not yet in a position to provide sufficiently detailed analysis of all of the headteachers' perspectives and theories of change, so the two sketches that we provide are by way of illustration only.

The headteacher of **School 3** started in Sept 2004, and defined the key problem in the following way: Systems in the school no longer fit the characteristics of the pupils they now serve, so that there is a need to revise the systems and to train staff. In more detail: there were few behaviour options for students when the headteacher arrived at the school. This coincided with falling roles in middle schools and a consequent widening of the intake beyond the socio-economically relatively well-off locality of the school - but staff hadn't changed how they teach, and the systems used across the school had not changed either. Either pupils were in lessons behaving – or out of them doing nothing, and eventually excluded. This headteacher describes her own background as 'adapting schools for pupils', and she has experience which includes working and leading in SEN schools. In this school, she saw that there was a weak link in the pastoral system, in the code of conduct, and in the lack of consistency of discipline procedures. In June 2005 the school launched a new code of conduct, and also a behaviour reporting system called Sleuth which makes it possible to look for behaviour problems across the school.

There's been little staff development in the past. Something of the attitude of staff to inclusion can be seen in staff approaches to coursework deadlines - up to now they've seen it as the pupil's problem to get coursework in on time, rather than working with pupils to make sure that it happens. Some of the staff are perceived to be quite resistant towards having to change in this way.

In **School 4**, the problem is defined in a very different way. The school is seen as being expert at dealing with diverse needs – and has become, in some senses, a victim of its success in this way. The deputy head's view has changed, so that he now believes that schools can have too many pupils with identified needs – meaning needs that will not be satisfactorily catered for within lessons and systems as they generally are.

In general, the school philosophy is that pupils act reasonably, so that there is almost always a reason for challenging behaviour, and that therefore on most occasions it is within the school's capacity to do something about such behaviour. One of the keys is to ensure teamwork and good communication around the school. That necessarily extends to coordination between the elements of external support that are available. Previously there was little cohesion, and a separate pastoral deputy, no link to learning support, YOT, social services – that is now in place.

The school applies an 'academic' systems approach to inclusion, meaning that it is serious about learning for everyone. Systems and provision are set up across the school that a good head of department would set up within his or her own domain. There is much less knowledge of what is going on beyond the school. There is a strong boundary between the managed community of the school, and the relatively little understood communities around it. There is a sense of a growing issue around disaffected girls, truancing, some language issues for boys... and a sense that there is no need to know about these issues in any detail.

In this school, professional development is seen in terms of several different strands. Staff such as middle management are seen as needing coherent programme of training – all of them. But there is also room for individual members of staff with particular interests and skills – and it is at this point that action research becomes a useful tool.

#### *Comparison of school leaders' theories of change*

The problems of these two schools are quite different – one seeing the need for a strengthening of systems, the other wanting to encourage staff to develop the detail of more inclusive practice. This comparison supports the idea that becoming more inclusive involves changes at more than one level in school.

However, these school leaders offer some similar ideas, in identifying some specific groups of pupils whose characteristics of behaviour, particularly outside the school, become talked about within school as a factor needing what we might call 'inclusion work'. What is interesting here is that both leaders

emphasise the responsibility of the schools to take on this work, to adapt and change their practices in order to create a more effectively inclusive school.

### **A theory of changing practice for teachers**

As part of gathering baseline data for our project, teachers were asked to complete two questionnaires which solicited information about their knowledge of, experiences of, and attitudes to inclusion, action research and networking. In order to gain some understanding of the theories of change for teachers participating in our project we have examined the responses to four questions from the first part of one of the questionnaires. Responses from 32 teachers from five schools are at present available for this analysis. Table 3 shows the characteristics of the teacher groups involved in the project at each school. Each school selected the group of teachers that would participate and the basis of this selection varied, although, on the whole, headteachers asked academic departments to volunteer for participation .

**Table 3: Characteristics of teacher groups**

<b>Group</b>	<b>Number of respondents</b>	<b>Composition of group</b>	<b>Percentage female</b>	<b>Years service of (range)</b>	<b>Years service of (mean)</b>	
Group 1 (School1)	7	Welsh department + teacher from English dept	100	5-34	16	
Group2 (School2)	9	Humanities department + deputy headteacher	75	1-28	13	
Group 3 (School3)	8	Science department	48	2-32	14	
Group (School 4)	4	0 (not yet completed)	History department	100	3-8	5.5
Group (School 5)	5	3	3 teachers from science department	66	2-8	4
Group 6 (School 6)	5	Humanities department + deputy headteacher	100	10-30	21	

Teachers were asked to explain what the term inclusion meant to them. Their responses can be grouped similarly to Ainscow's (2003b) definition of inclusion in terms of which pupils are present in

the school (presence); which pupils are participating in the educational and social activities of the school (participation), and which are achieving at a high level (achievement). Examples of these types of definition were evident in our sample:

### **Achievement**

'Achievement for all'

'Including all pupils in mainstream education regardless of ability/disability; providing high expectations for all; removing barriers to achievement; promoting understanding of diversity; challenging discrimination'

### **Participation**

'Inclusion - allowing all students to access the curriculum at a level suitable for them; the access must be real in lessons, not just on paper.'

'Inclusion means involving and engaging all (or vast majority) of students in a meaningful and relevant curriculum. However this may involve considerably differing curricula for different students.'

'Making sure that all students in the class get the best out of what is offered.'

'Pupils needing extra learning support are wholly or partially included in lessons with other pupils in a mainstream setting.'

'Inclusion means the accommodating of pupils with some special needs into mainstream classes, while providing the necessary support to make this effective'

### **Presence**

'Keeping pupils with learning, physical and / or behavioural problems in mainstream lessons.'

'Inclusion - from the word include - if a child with a problem for them to be included in the lesson even if they are a problem.'

'A money saving scheme to get all pupils into mainstream schools without accounting for their needs.'

A number of teachers used the terms 'access' and 'opportunity' to the curriculum when defining inclusion:

"Giving children the opportunity to develop, and get a wide education across the curriculum which is suitable for their talents and abilities'

'Children with special needs getting access to mainstream education'

These definitions are not as easy to locate in Ainscow's classification because they do not make explicit the level of participation by pupils. Active pupil participation is not specified, although it could be argued that it is implied because if opportunity and access are provided then inclusion is likely to involve engagement by the pupil and the provider.

The following item in the questionnaire sampled the teacher's operational knowledge of inclusion in their specific context. They were asked to 'list up to three examples of what they or their school were doing to become more inclusive'. The examples that were included in the responses can be grouped as follows:

### **Pedagogical solutions**

e.g. teaching subskills – thinking skills, listening skills, language skills;

using a variety of teaching methods;  
differentiation;  
mixed ability teaching.

### **Support solutions**

e.g. learning support assistants;  
support teachers;  
behaviour officer.

### **Systems solutions**

e.g. pastoral system;  
behaviour tracking system;  
behaviour policy.

### **Locational inclusion solutions**

e.g. special classes;  
special courses;  
special units on mainstream site.

### **Adjustments to the physical environment**

e.g. ramps for wheelchair access;  
radio aids for hard of hearing.

If the teacher definitions are examined in the context of how they have described inclusion in their school, it may be possible to get a clearer idea of what the issue of inclusion means to the teachers. It also allows us to examine the definitions from the perspective of teacher engagement as well as pupil participation.

Teachers who gave *participatory* definitions were found to generally see solutions to inclusion being based on pedagogical approaches that they would implement themselves. For example, using the definition 'Trying to get every pupil in the class to have educational benefit from the lesson', a teacher described current moves to further inclusion through, 'varying teaching methods e.g. group discussion; concentrating on listening skills; worksheets which are of benefit to every pupil in the class'.

Again, a teacher with the definition, 'Inclusion means the accommodating of pupils with some special needs into mainstream classes, while providing the necessary support to make this effective' described how 'Year 7 science is now arranged with less/ no separation between pupils with special needs and mainstream classes'

However teachers who gave *presence* definitions did not on the whole regard their own classroom practice as the focus for developing inclusion. For example, a teacher giving the definition, 'Keeping pupils with learning and/or behavioural problems in mainstream classes', described the main developments as the 'behaviour policy; new student support centre, and the internal exclusion unit'

Likewise, a teacher defining inclusion as 'a situation where an individual who is experiencing learning difficulties because of disability or behavioural problems can be taught in the mainstream' mentioned

work such as 'use of support teachers within lessons to support pupils; differentiating work; developing more awareness of it in INSET training'.

When analyzing the responses of the teachers who used definitions that described inclusion as giving access and opportunity, it was found that they often perceived inclusion as providing these opportunities within the mainstream school, although not necessarily in the mainstream classroom:

For example, a teacher giving the definition – 'where every pupil regardless of ability, gets the opportunity to receive a standard education in a safe establishment', mentioned work on 'holding lower ability groups which receive properly differentiated lessons; appointing a behaviour officer and youth worker to work with pupils with problems; a special unit has been established on campus to offer education for pupils with disabilities'. Likewise a teacher giving the definition: 'children with special needs getting access to mainstream education', mentioned 'special units for children with intensive special needs; detailed planning for learning groups to ensure all achieve their potential'

Therefore within this sample there seem to be three positions adopted by teachers:

- **Passive includers** who acknowledge the presence of children who are being 'included' in their class but who do not actively work to enable access to the curriculum through their teaching.
- **Locational includers** who regard inclusion as any type of provision that is delivered or situated in a mainstream school setting, even though it might be segregated from the majority of pupils. Although this teacher will approve or even be an active supporter of a special class or unit in their school they will not recognize the central importance of their pedagogy in the mainstream classroom as developing inclusion.
- **Active includers** who take the responsibility of striving for access for all to the curriculum by developing their own practice in their own classroom. The mainstream classroom may include banded, setted or mixed ability groups.

These positions need not be mutually exclusive. For example a teacher may passively or actively include some marginalized groups in their mainstream classroom but still believe that other groups can only be provided for by specialist units or staff. Of the 27 teachers for whom we have clear responses to both these questions, four (15%) can be classified as passive includers, seven (26%) as locational includers and 16 (59%) as active includers.

Interestingly, early analysis would suggest that there is a strong correspondence between the headteachers' theories of change, the picture of inclusion in each school as described by teachers and the perspectives of inclusion held by the majority of teachers involved in the project. For example, all of the teachers in School 5 had an active inclusion perspective and the head teacher was setting the school on a course for increasing fully mixed ability provision. This shared perspective is perhaps not surprising but it does lead us to reflect: Are teachers' perspectives strongly influenced by how they see inclusion being developed in their present post? Or have they joined this staff because the school's ethos is in keeping with their own? It is of course also possible that both the teachers' and headteacher's approach to inclusion has been affected by something else – such as a particularly influential SENCo for example, or a series of dramatic events in the school. This is a relationship that we will want to work further on in future.

Returning to the theory of change, further understanding of teachers' perspectives about inclusion were elicited in the questionnaire by asking the teachers to reflect on 'what you or your school could additionally do to become more inclusive'. 25 of the teachers responded to this question. Examination of the suggestions that were made by teachers found that the majority (54%) could be described as 'changing how we teach'. For example,

'A variety of learning strategies to incorporate learners who learn in different ways; extend our provision of differentiated work; ensure that everyone receives a unique course which enables

them to learn how to learn'... 'Modifying tasks to appeal to the student, to fit the ability of students'... 'Expand learning strategies further; incorporate more teaching and learning methods; develop pupils' abilities to teach themselves by learning how to learn.'

These suggestions have some correspondence with the type of teachers that we have labelled 'active includers'. In contrast, 17% of suggestions for change focused on the school providing 'different courses for different abilities'. For example:

'Development of a wider range of courses for all abilities'... 'Earmark teachers with expertise in the subject/special needs to teach the pupils; more training for teachers who teach the groups'... 'Organising more practical courses for children who are not academic.'

This point of view could be equated with the teachers we have labelled 'locational' includers'. Finally, 11% of responses indicated that change could come about by the provision of additional resources:

'Provide suitable equipment in the classroom-computers/television'... 'Ensure sufficient LSA support is available and liaise better regarding objectives, spellings, expectations, skills etc.'

or systemic approaches (17%):

'School wide strategy to improve pupils' attitudes to wards the Welsh language - the strategy to include parents' attitudes; better cooperation with the primary to ensure attitudes/and that pupils have language qualifications to succeed; change schemes of work to be more interesting.'

Looking at the responses of each teacher taken as a whole, 52% of the teachers could be regarded as wanting to develop inclusion by developing their teaching in the mainstream classroom (although a high proportion of these classes will be ability grouped); 20% advocated the further development of specialist classes; 16% looked to changes in systems and support and 12% of responses were so mixed that they could not be classified.

Was there any correspondence between a teacher's type as classified from the definitions they provided and a teacher's suggestions for how inclusion could be further developed? A majority of both passive and active includers made pedagogical suggestions for ways for them or their school to move forward on inclusion. All those classified as locational includers, with the exception of one who looked to changes in her teaching, suggested locational, support or systems developments.

It is also useful to compare the teachers in different schools, to see the extent to which there was homogeneity between the views of the members of groups.

- Group 1 had members with both locational and active inclusion perspectives and their suggestions for change varied greatly across the group.
- Group 2 showed considerable agreement around a locational perspective on inclusion but were divided between whether the way forward lay in locational or pedagogic solutions
- Group 3 shared an active inclusion perspective but one member, in what was albeit a mixed response, looked to locational solutions.
- Group 5 displayed a high level of heterogeneity in their perspectives on inclusion but the majority agreed in making pedagogical suggestions for developing inclusion.
- All members of Group 6 were classified as active includers and all but one suggested making changes in their classroom teaching as the method for developing inclusion.

Therefore it can be seen that groups varied in the degree to which there was a unity of outlook about inclusion and how it should be developed.



Another significant aspect of the theory of change is to consider the support which would be needed if the proposed changes are to occur. A further question asked respondents to 'rank the following factors according to how important they are for supporting increases in implementation of inclusion'. Table 4 shows the frequency of selection of the factors based on the first three choices made by respondents. These emphasized the need for more time for planning and collaboration. Development and training, class size and material resources were also seen as important. Less attention was given to curriculum diversity and teaching assistant support. There was relatively little enthusiasm for the potential role of LEA staff or pupils.

**Table 4: Frequency of selection of factors based on first three choices made by respondents**

Factor	Frequency (%)
More planning time	21
More time for collaboration	20
More development and training	14
Smaller class sizes	13
More material resources	12
More curriculum diversity	5
More teaching assistants	4
Increased parental involvement	4
Increased pupil involvement	3
More LEA support e.g. advisor, EP	3

For these teachers the greatest priority is more time to plan lessons so that they can use the skills that they have more effectively. They would also value more time to work with their colleagues and this testifies to the value that teachers' place on sharing expertise and coordinating work with peers. Recent changes in teachers' duties may fulfill some of these aspirations as teachers should have more time available for preparation. Development and training is also a frequent choice but looking at the low priority given to LEA involvement, the LEA may not be perceived as the best source for this activity. It is perhaps surprising that teachers are not prioritizing additional teaching assistants as, for example, this is very commonly the solution sought to enable the integration of children with special educational needs. This may owe something to sensitivity about classroom assistants' roles as the teaching profession engages with restructuring of the work force. Teachers' perceptions of the purpose of the project may have also influenced their response.

Examination of these parts of the teacher questionnaire has allowed us some early indications of how teachers' view the changes that might occur in developing inclusive practice. A more detailed scrutiny and development of teacher' theories of change will occur as school based projects are planned and implemented.

### **Educational psychologists' theories of change**

As conceived and embedded in the structure of the project, educational psychologists will play a key role in facilitating the process of developing inclusion. Educational psychologists are well placed to take on this role because central to the values and practice of their profession is the social justice

agenda and improving the educational opportunities of marginalized groups (Mackay,2002).With their knowledge of a school's systems and practices they have much to offer as facilitators within an inclusive school approach (Englebrecht,2004). The traditional view of the educational psychologist is of a 'test-basher' who predominantly works assessing individual children. Although educational psychologists are able to offer to schools a far wider portfolio of skills than this, there is still a tendency for school's to prioritize individual case work over systemic practice. The psychometric role has been reinforced because an EP assessment is a mandatory part of a formal assessment of special educational needs. It is the view of many educational psychologists and recent important reviews of their profession (Welsh Assembly Government,2004) that systemic work may very often be a better use of educational psychologists' time and professional skills and that it is an aspect of their role that should be more fully developed.

What are the views of the six educational psychologists of the part they will play in the project? Although they recognize that many of the skills that they will be using – being a chairperson, counsellor, supporter, sounding board – are all used in their more usual school work; they recognize that they will be deployed in the project in a different context and one that contains more uncertainty. The nature of action research, indeed all research, is that the outcome is uncertain and success is not guaranteed. This causes anxiety for some teachers, which EPs have reflected on:

'It has been challenging, saying, it's *meant* to be unknown, and we're going to plan this together. They've been searching for something concrete from the word go. What is this project about? Just saying that it's about promoting inclusion isn't good enough... They've had to come up with something from a very early stage, so that they feel that they can do something, so that they're aiming clearly for it. They couldn't wait for the posters' (EP, focus group)

It is clear that for some educational psychologists, there is significant pressure to reduce this anxiety by falling into the role of expert-in-charge, in line with teachers' expectations of many INSET scenarios. This reveals a dilemma for the EPs, in trying achieve both the conditions for teachers to act as agents: a) facilitating a useful and relevant process) b) safeguarding the teachers' ownership of the process and c) 'carrying the baggage of theory'...whilst at the same time, resisting d) being placed in the role of the 'expert', e) being directive, or f) taking charge.

'I feel that my role is to be meta to it (*the process*) but with a backpack of ideas that they can come to if they want to' (EP, focus group)

In other schools, early experience suggests that ensuring effective communication in the school will require the EP's attention:

'my experience is almost the opposite. These three teachers seem to have signed up for something and they seem very willing, but I don't think the passage of information has got to them at all. So when I said there will be teacher networking, they said, oh wow... I almost feel that they've signed a blank cheque. .. so there's a lot of groundwork to go on there, so that they are fully informed. I felt the school was fully informed, but I don't know how much has got through' (EP, focus group)

The educational psychologists face further challenges (shared by teachers) of keeping the project high on their list of priorities (when other pressing work may be jostling for attention); finding the necessary resources of time and energy; and coping with organizational issues that bedevil most busy workers' lives, for example finding a time in the diary when everyone can make a meeting! They have also begun to identify factors in school which make it more difficult to adopt a new way of working – misunderstanding of and lack of communication from managers about how the project, and EP role within it, works; traditional views of staff development as course driven by experts. As one mentioned:

staff development... was very course-driven. [The headteacher told us] 'I send people on courses to this organisation...' all curriculum-related. When we're looking at, where's the space to do an action research project? It wasn't a big priority, because they all wanted something telling them how to.... Courses where they tell you how to teach your subject... (EP, focus group).

However for them the important gains that may result from this process relate most crucially to a wider and different role for educational psychologists, accompanied by a change in teacher culture. For example, educational psychologists would like to have the opportunity to build different relationships with their schools,

'It would be great if they began to see me more as someone who could build something positive rather than deal with problems. That would be wonderful' (EP, focus group).

They hope that their value as facilitators of changes in school systems will be recognized and that they will be recognized as having an inclusion brief that is wider than just special educational needs. It is already clear though that the EPs will be in a position to understand a lot about the barriers to this change, which will in itself prove potentially useful data.

'We said... there were three days when the schools could network, and [the headteacher] was outraged. It was practically a 'waste' of three days of meeting other people and other schools. [The headteacher] would rather have that time for preparing resources... It was very insular: 'I don't want to share with everyone else' (EP, focus group).

Whether in the context of such skepticism, or in a school more supportive of the philosophy of development embedded in the project, EPs had a strong sense of the value of the possible outcomes of the projects in which they were partners. Changes in teacher self perceptions and culture would be complementary to the changes for children and young people:

'If they( *the teachers*) have a sense that they can reflect and think a little bit about themselves, and if that can hopefully feed into how they teach and how the children respond' ....'EPs will benefit from changes in teacher thinking about how to go about things' (EP, focus group)

## **Discussion**

So how will theory of change help us to understand the journey that our teachers are making, a journey to develop their inclusive practice? We want to understand what helps and hinders teachers in using action research to develop their inclusive practice. A theory of change can be likened to a map for that journey and we want the teachers to construct a sound map because this will help us and them better to follow the most effective route, and to understand why this is the best way to go.

It is important to emphasise that we ourselves are not in a position to construct an ideal theory of change for the teachers. Like Spillane's situationists, our commitment to action research as an approach in the context of inclusion means that, being ourselves outside the context in which teachers are acting, we have no privileged position in which to determine the best course of action. Instead, our position in this project is one of accompanying the teachers and others over a period of time in which they are working their own way forward towards more inclusive practice. The theory of change is proving to be a valuable way of interpreting and thinking about development in the six schools involved in this project.

The early data analysis that is included in this paper is the first step in drawing the map for teachers to use. Examining the questionnaire responses has allowed us some insight into where teachers are starting from in their perspectives on inclusion. Although all the teachers understand that inclusion is about widening opportunity, most see this as linked particularly to special educational needs .How it is considered that this can be accomplished varies considerably from increasing specialist curricula and

classes located on the mainstream campus; through improving teaching methods for all classes some of which will be grouped by ability; to fuller and better implementation of mixed ability teaching.

Accessing the theories of change of significant actors in the school and LEA provides information about the context – it allows us, if you like, to add the contours and other environmental features to our map. This work is only just beginning with a great deal of data to be analysed. We hope that by examining the LEA managers' and headteachers' notions of the best methods for building inclusion and the initiatives they are putting in place we can begin to see if these will support the teachers on their journey.

Collaboration between the teachers is another focus of interest. Working together with colleagues can be both a powerful catalyst, and sustainer of change; however some groups of colleagues work together better than others. Understanding the structure and dynamics of the teacher groups and how this links to their effectiveness is an important element in understanding the ecology of the teachers' learning environment. Examining the prospective theories of change between teachers within groups will contribute to this analysis. From the early analysis in this paper it would seem that some groups share the same outlook on inclusion, others have a more mixed perspective. A task for the educational psychologists will be to help teachers explore these differences and facilitate moves towards a shared theory of change which is owned by the entire group. This should contribute to change being accomplished more effectively.

As projects advance in the schools we will use the teachers' theories of change to evaluate the changes that occur. If predictions are justified then these theories will have a high potency for providing explanations for why these changes have occurred.

The project also has an interest in the role of the educational psychologist. We have begun to look at their role and how this might lead to changes in how they work with their schools. Education psychologists share many of the pressures and anxieties that they have perceived in their teacher colleagues. For example, in sufficient resources of time and anxiety about the uncertainty inherent in research paradigms.. The focus group data described in this paper has begun to examine some of the dilemmas and difficulties in trying to adopt a more systemic role; however there is a need to more fully explore the issues that underlie why changes in EPs' practices away from individual casework are difficult to achieve and sustain.

## **Conclusion**

Developing inclusion in schools cannot happen without changing the cultures within which teaching and learning take place; from the macro-level of society to the micro-level of the classroom.

For effective cultural change to occur there must be a deep understanding of the problem or issue that underlies the need for change. Generating a strong theory of change can foster this insight. By constructing the theories of change of teachers who are developing their inclusive practice, we can help them to build strong theories for change but also understand better what the process of change means for them. Viewing them alongside the theories of other significant actors, provides a framework to judge what elements in the contexts, in which the change will take place, will help or hinder the change.

In this paper we have begun the process of developing these theories. We will be able to add more depth as further data is analysed. Teachers' theories will also continue to be developed and revised as their projects are implemented. This early analysis suggests that although teachers have different perspectives on how to define inclusion, which are strongly influenced by the ethos of their school, they see change as occurring by developing practice in school systems or their own classrooms rather than the addition of specialist classes or units. Although teachers do want training to support them in making these changes, teachers also prioritise the need for time to plan and collaborate with others.

Opportunities such as these will be best afforded by manager, be they at the LEA or school level who have a 'situated' perspective on teacher development. If the manager does not have this perspective but takes, for example, a 'behaviourist' approach to training then these opportunities are less likely to occur. Therefore by making these comparisons between teachers' theories of change and those of significant others, we can begin to understand what factors help and hinder the development of the teachers' inclusive practice.

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