Establishing a School for Gifted Children: The interplay between the government regulatory requirements and the values and goals of the Governing Board in decision making

by

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Thesis
Submitted to Flinders University
for the degree of

Doctor of Education

College of Education, Psychology and Social Work

November 2021

Abstract

This research examines the interplay between values and aspirations of a group who established an independent school for gifted students and government regulations with which they had to comply. In particular, it examines the extent to which the group's stance and goals were supported or constrained by Australian state and federal regulations they were required to work within and how this interplay impacted on decisions made.

Starting a special interest school is a nebulous and multifaceted process that must comply with the same general regulations as established schools (Mulford, 2004). On more than one occasion, schools that have sought to be innovative, or to address specific educational needs, have ended in failure as they struggled to balance their unique intent against government requirements (Tubin, 2008). In the study reported in this thesis, the initiating group found there was very little research literature or few resources regarding the development phase of an organisation to inform or guide them (Collier, 2001; Douglas, 2012; Nicholas, 2008).

An interpretive research approach was adopted, and data were generated from: (1) a retrospective document analysis, which included the minutes of the foundation group and board meetings (of the new school) as well as a reflective journal kept by the researcher during the establishment period; (2) rich picture interviews with key stakeholders; and (3) participant observation within an auto-ethnographic approach. Kotter's (1996, p. 62) eight-step model of leading change was adopted as a conceptual framework to narrate the processes and stages of development and as a theoretical lens to inform the research analysis.

Key findings demonstrated that there were four distinct stages in the creation of a new innovative school, with each stage including distinctive ways of thinking and acting to meet changing needs throughout the process. It was found that, at the outset, development of a communicable vision and core values for the new school is critical, as it provided the basis for the foundation of the school

and informed its distinctive new pedagogy. Over time, leadership played an increasingly important role in making decisions to ensure and establish structures and processes that were reflective of the vision and aligned with core values. Management was also an important element, providing momentum for continuing action and fostering motivation in moments of challenge. It was found that it is important for an initiating group to seek guidance from external experts in order to develop strategic, legal and financial plans. As development progressed, selecting people who were willing to be delegated specific responsibilities became more important, in order to distribute increasing workload. For delegation to be successful, the leadership team had to be committed to delegate specific responsibilities to subgroups.

This research generated knowledge derived from a retrospective analysis. It is therefore possible to imagine that the process of establishing this school would have benefitted significantly if this kind of knowledge had been accessible at the start of the process: it would have assisted those involved in the development of the school to be more reflexive and self-critical. Although grounded in the unique context of one new school, it is anticipated that the understandings generated in this thesis will have application to others taking on a similar challenge beyond the context of this research and beyond those involved in the ongoing development of the school.

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Glossary

ACARA	Australian Curriculum, Assessment, and Reporting Authority
AISSA	Association of Independent Schools of South Australia
DECD	Department for Education and Child Development
DECS	Department of Education and Community Services
EECSRSB	Education and Early Childhood Services Registration and Standards Board of South Australia
MCEETYA	Melbourne Declaration on Educational Goals for Young Australians
NAPLAN	National Assessment Program-Literacy and Numeracy
ONGSS	Office of Non-Government Schools and Services
SA	South Australia
The Act	Education and Early Childhood Services (Registration and Standards) Act 2011
TIMSS	Trends in International Mathematics and Science Study

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Declaration

I certify that this thesis does not incorporate, without acknowledgement, any material previously submitted for a degree or diploma in any university; and that to the best of my knowledge and belief, does not contain any material previously published or written by another person except where due reference is made in the text.

SIGNED:

DATE: 15 October 2021

Acknowledgements

I would like to acknowledge the following individuals for their valuable support to this thesis.

To my supervisions Professor Janice Orrell and Dr Jane Jarvis who shared their skills and experiences through my study and for their support, and my previous supervisor Professor John Halsey who provided advice during the early phase of my research. Also, a special thank you to Dr Richard Draper who helped with editing this thesis.

My daughter, Crystal who was part of the original (new) school board, who worked alongside me up until the school opened. It was her hard work and dedication that made much of this dream come true.

I want to express my gratitude to the past board members. I appreciate their time, effort, and honest reflections on the time they spent designing the school.

I am truly thankful to have an amazing husband who has been at my side throughout the development of the school and supported me every step of the way.

Chapter 1. Introduction

Introduction

The origins of this thesis were generated from a deeply personal interest and experience. When my youngest daughter was in primary school, I attended a parent-teacher interview in which her teacher suggested that my daughter undertake an educational assessment, as there appeared to be an underlying learning problem. When my daughter underwent assessment with a psychologist, the report stated she was *gifted*. My understanding was that a gifted child demonstrates high intellectual ability beyond those of their peers in one or more areas. The teacher reviewed the results and stated, "This is not your daughter's report - I think the psychologist has made a mistake". I was bewildered that a teacher could make such a comment. From this point forward, I found myself having to be an advocate for my daughter's education and, as a result, became interested in gifted education from a teaching perspective. As a teacher of many years myself, I became exasperated with the lack of understanding among teachers regarding the needs of gifted students. I discussed this problem with a colleague, whose immediate response was, "Let's start a school for gifted children". This is precisely what happened. We established a school for gifted children, with the school in question opening its doors to fourteen students on 28 January 2017. I had worked with a group of interested and committed people to establish the school, and I was appointed the first principal.

The focus of this thesis is the process of establishing a school for gifted children. The aim is to examine the interplay between the values and aspirations of a group attempting to establish such a school and the government regulations with which they had to comply to achieve this. In particular, the research examines alignment (or misalignment) between the group's core values and goals and the regulations they were required to address and how this alignment influenced decision-making processes.

A Changing Education System

Over the past fifty years in the Australian educational system, “gifted and talented education has seen tremendous gains as well as significant setbacks” (Wallace, 2016, p. 1). Federal (Commonwealth) Senate Inquiries into gifted education were conducted in 1988 and 2001, with findings revealing a lack of provisions (Kronborg & Cornejo-Araya, 2018; Vialle & Geake, 2002). Despite numerous recommendations being made by these inquiries, very few changes occurred throughout Australia (Walsh & Jolly, 2018). Additionally, there is “a lack of federal policy to drive educational provision and funding for gifted education across all levels and sectors of schooling” (Moltzen et al., 2018, p. 6), with schools today left to cater for gifted students without any mandated approach or support (Moltzen et al., 2018).

Masters (2015) highlighted a span of up to six years in achievement levels between students in the same year level based on National Assessment Program Literacy and Numeracy (NAPLAN) results. Masters (2015) stated that “the most advanced five percent of Year 3 students outperform twenty percent of Year 9 students” (p. 2). Accordingly, in a classroom a teacher may be faced with students of the same age but with significantly mixed abilities, despite having an expectation that students attain curriculum goals and progress automatically from one year to the next (Masters, 2015). When teachers do not differentiate learning experiences, teaching across a wide range of ability levels means that many students are expected to either learn material that they are not ready to learn or engage in learning activities for curriculum that they have already mastered (Masters, 2016). The mismatch between student skill level and instructional level is referred to as a curriculum or educational gap (Pritchett & Beatty, 2012; Wagner, 2017).

Many teachers in Australia do not feel sufficiently prepared to address student ability gaps (Matheis et al., 2019; Rowan & Townend, 2016). They are expected to cater to the range of abilities, including nurturing students with high intellectual potential (Walsh & Jolly, 2018), while making only minor modifications to the curriculum (VanTassel-Baska & Baska, 2019). In these conditions,

research identifies a range of negative outcomes that may occur for students with high intellectual abilities (gifted) if they are not appropriately supported (Bourne, 2009; Jolly & Jarvis, 2018; Jolly & Makel, 2010; Wallace, 2016). The current educational environment often results in students with high intellectual potential experiencing boredom with the pace and content of their learning, behavioural issues, underachievement, disengagement, unsatisfactory peer relationships and potential mental health difficulties (Free, 2017). Free (2017) reported that such outcomes may result in greater demands being placed on parents, leading to parents becoming frustrated that their child's high intellectual ability was not recognised and catered for within the mainstream school. Slater et al. (2020) reported parent dissatisfaction with mainstream schooling due to "limited understanding by teachers in relation to accommodating the child's specific educational need(s) and/or the lack of available provisions to support and accommodate the child's specific educational or care need(s)" (p. 9). Such dissatisfaction has prompted many parents to choose home schooling, including parents of gifted children.

Educators who specialise in gifted education (gifted educators) have become increasingly frustrated with the current education system when their colleagues ignore their advice on ways to support students with high intellectual ability. Consequently, barriers between teachers in mainstream education and teachers in gifted education can develop (Watgen, 2020). Teachers in gifted education report that students with high intellectual potential have been left behind and are not receiving a fair and equitable education (Watgen, 2020). It has been common for principals to argue that "gifted education is not a priority within their school" (Walsh & Jolly, 2018, p. 87), a position supported by Henderson and Jarvis (2012), who stated that gifted programs are often perceived to be an "optional extra that would be nice to implement given unlimited time and resources, but which is ultimately seen to divert resources away from students who really need them" (p. 16). While there are a range of views about effective approaches to the education of gifted students, Steenbergen-Hu et al. (2020) and Wormald et al. (2014) supported the ideal that gifted

children need specific educational programs that not only challenge and enable them to progress through school, but also have positive effects on their wellbeing (Coleman et al., 2015). Masters (2016) highlighted "an issue with the traditional ways of organising and delivering school education" (p. 2) and advocated for a need to "think differently about schooling" (p. 2).

Some commentators argue that the current education system is entrenched in an outdated model of education progression, primarily in which there is an expectation that students will transition through each year level according to their age (Baker, 2013). We have now entered an era of lifelong learning that aims for self-regulation and independent learning, in which the established system can be seen as no longer adequate (Baker, 2013). Furthermore, "the most advanced ten percent of students begin each school year five to six years ahead of the least advanced ten percent of students" (Masters, 2016, p. 1). As a result "of not challenging the current model it is likely to be that large numbers of less advanced students will continue to fall behind", whilst "advanced students are unlikely to achieve the levels that they could achieve if their learning needs were better identified and met" (Masters, 2016, p. 4). Alternative approaches to education need to be considered to address the education gap for our learners, and these approaches may range from changes within existing schools and programs to the more extreme option of specialist schools. As there are challenges for the current education system in supporting the requirements of students with high intellectual potential, it is unlikely that there will be a single response.

The 1970s signalled important policy changes in Australian education and ushered in a period of dramatic alteration as the government committed to reforming and revitalising education (Rawolle et al., 2016). At a national level, a drive for reform was set in motion through the establishment of the Australian Schools Commission. Two key assumptions underpinned this development. The first was that funding ought to be based on students' needs and the second was that enhanced autonomy of schools ought be implemented, as increased decentralisation of

decision making (to local authorities) was seen as desirable (Ainley & McKenzie, 2000; Rawolle et al., 2016). It was argued that changes such as these would lead to enhanced quality and educational effectiveness, and enable more equitable and balanced education delivery (Ainley & McKenzie, 2000; Rawolle et al., 2016). Furthermore, these conditions would provide more choice in the ways in which children were educated (Addi-Raccah & Yemini, 2018; Eyal & Berkovich, 2010). In contrary, Walberg et al. (2000) suggested that "decentralisation had little or no influence on value-added learning" (p. 163), while Thomson and Hillman (2019) contended that there was an improvement in job satisfaction and professionalism on the part of principals and teachers.

Over the past two decades, some parents and educators have become disillusioned with the current education system and, buoyed by the rise of individualism and marketisation of education, have sought alternative solutions. One example of an alternative has been home schooling (English, 2013; Jolly et al., 2013; Slater et al., 2020; Winstanley, 2009) in cases where parents didn't believe teachers and schools had the relevant expertise and resources to support their perception of their children's different developmental needs (Slater et al., 2020). Another has been for groups of parents and other stakeholders to establish their own schools that reflect their own particular values and educational needs (Addi-Raccah & Yemini, 2018). Despite the fact that alternative schooling for gifted students seems at odds with a broader systemic drive towards more inclusive educational practices (as reflected in the 2019 *Alice Springs (Mpantwe) Education Declaration*), the experiences of the educators and parents at the heart of this study had not lived up to inclusive ideals. It is in this context that they developed a plan to establish a school for gifted children, which they perceived to be the most appropriate response to their ongoing frustration with mainstream schooling.

Statement of the Problem

Central to the focus of this study is the establishment of a specialist school. The establishment of new schools is motivated by a range of purposes, including a focus on a particular educational innovation (a new way of doing and thinking) or phenomena (a new way of structuring, managing, and leading) (Nicholas, 2008). Tubin (2008) distinguished the establishment of schools with innovative motivations and those schools established to belong to particular religious (Catholic, Lutheran, Islamic) or philosophical (Montessori, Steiner) affiliations. Tubin (2008) argued that schools established with such affiliations were more likely to replicate the current established patterns and structures.

There are a number of challenges in establishing a school. What first confronted the group of participants in this study was their own lack of knowledge and awareness of what the established processes were and/or what they might expect to find that could inform or guide them. As there were currently no specialist primary schools for gifted students in Australia, there were no pre-established processes or models to follow.

Significance of the Research

The challenge of finding support and guidance for establishing an independent special interest school is that there is a relative paucity of research on this process and on the effectiveness of these schools in supporting the specific educational needs and interests to which they aspire. In particular, little research has focused on how governing boards of new schools have established themselves and their operations within Australia (Caldwell & Spinks, 1998; Cranston, 2001; Cranston et al., 2010; Shonubi, 2012). To date, the research has focused on the further development of already established schools (Mulford, 2004). There appears to be a gap in the literature in the examination of the initial development of schools' governing organisations during their formation prior to opening the doors (Mulford, 2004). Only a few Australian studies have examined this

establishment process (Collier, 2001; Douglas, 2012; Nicholas, 2008). Therefore, this research endeavours to make a contribution to understanding the complex issues in forming a new school.

Not only will this study provide new knowledge and insights for future similar undertakings, but it has also generated and captured the history of the early years of development of a particular special-interest school. This history will provide the particular school in the study with an opportunity to reflect on its initial inception when planning for its future, providing an opportunity for its educational leaders and teachers to monitor their practice in the ongoing development of the new school. It will also provide insights into the process for others who wish to establish a new and independent school, should they take up the challenge. The significant contribution of this study is in its descriptions of its engagement, not only with its interest in gifted education, but also its concern with the regulatory frameworks at State and Federal levels in establishing a school. This latter focus has been absent in the few studies found on the establishment of independent schools.

Research Questions

The discussion in the preceding section provided the impetus for the following primary research question:

> What is the interplay over time between a special interest group's values and aspirations and their compliance with required government regulation to achieve the outcome of establishing a school for gifted children?

This question was the basis for the following sub-questions:

- What were the shared beliefs, values, and practices of the group in establishing a school?
- How does attention to government regulations and policies pertaining to establishing a school facilitate, constrain, or sustain the core values and goals in the establishment of a school with a special focus?

What Drives My Interest in this Research?

My personal philosophy of education is fundamentally based on the belief that all students have diverse needs in their learning. As a mother and specialist educator of gifted students of many years' standing, I have had extensive firsthand experience of the passions and challenges of gifted children and teenagers. These experiences have engendered in me a passion for working with gifted students in a school setting designed for them to flourish as individuals.

I taught within the public education system for twenty-five years and observed that schools were not designed to support gifted individuals. As a teacher, I found it challenging to accommodate the associated diversity. In my experience, the focus within the school system was on students working at a common pace, progressing to new or higher levels of learning annually, and engaging with content that was largely teacher-driven. This does not align my own opinions about gifted education.

I believe that, from their first day at school, a child must be valued for who they are, encouraged and celebrated for their unique abilities and achievements, and supported to cultivate curiosity and a love of learning. To understand the students' lived realities, a student-centred approach must consider relationships between educators, students, and parents. This approach places students at the centre of learning, allowing them to lead their learning and explore topics of interest, specifically addressing their distinctive learning needs and providing real-life connections, all within an environment supported by parents and teachers. A student-centred approach gives students a voice and personalises their learning at an appropriate pace to support them as lifelong learners, expert communicators, and world-class innovative thinkers. In my opinion, gifted students are different, especially in the pace at which they learn, and need a curriculum that is relevant and engaging. Whilst there are some schools that recognise this diversity and support gifted education philosophy by enabling acceleration or enrichment in Australia, these schools are very few and far between.

The disparity between my own beliefs and the reality of the mainstream system drove me to envision an alternative option for gifted students, to undertake a project in establishing a school for gifted students and to complete this research. Not content with the current neoliberal school climate within which I was working, I joined forces with a group of teachers and parents to design an environment specifically for gifted students, based on best practices in gifted education pedagogy and research, to support gifted students to develop their abilities and their love of learning. Along with questions of equity and excellence, this posed challenges and motivated me to establish a school that would support the philosophical ethos for students with high intellectual ability.

Structure of the Thesis

This thesis has five chapters. Chapter 1 provides the introduction and background, the problem to be addressed and explains my interest in this research.

In Chapter 2, attention is given to what the literature reports on the educational needs of gifted students, evolution of the Australian Education system and provisions for gifted education in South Australia (SA). There is also a discussion on establishing a school (including regulations, funding, change management model and management and decision-making processes).

Chapter 3 explains the methodological approach and research design adopted in this study. It also describes rich picture interviews for generating the analysing of the data, role of the researcher as an insider and key ethical considerations.

Chapter 4 reports findings that emerged from rich picture interviews and document analysis. Themes were organised using a conceptual framework derived from a change management model.

Chapter 5 presents a discussion of key findings, implications, limitations, and recommendations for further research.

Chapter 2. Literature Review

Introduction

This chapter contains a review of the literature that has informed the key focus of this thesis on the establishment of a school for gifted students. First, the literature regarding the education of gifted students will be considered, including the arguments for and against establishing a separate school for such children. Next, the review will turn its attention to what is already known about the regulation and resources of schools in Australia and the regulatory requirements for establishing an independent, special-focus school.

The review of literature aims to locate this research within the following discrete bodies of knowledge:

- Educational needs of gifted students.
- Evolution of the Australian Education system and provisions for gifted education in South Australia.
- Establishing a school (including regulations, funding, Kotter's (1996) model of leadership and management and decision-making processes).

Education of Gifted Students

While definitions of giftedness vary and different terminology is used, gifted students are evident in all communities. Gifted children are defined by unusually high intellectual potential or academic performance in one or more domains, but are otherwise not a homogenous group (Baker, 2018; Barnett, 2019). At school, academically or intellectually gifted students are likely to have particular or additional educational needs when compared to their chronological age peers (Gross & Smith, 2021), often requiring classroom teachers to adjust their teaching to accommodate a range of abilities and characteristics to ensure continued learning growth (Bannister-Tyrell & Wood, 2021).

This section examines the education of gifted students in the following subsections:

- Characteristics of gifted students
- Definition of giftedness
- Curriculum for gifted students
- Teacher competencies for teaching gifted students
- Provision of specialist schools for gifted students
- Home schooling for gifted students

Characteristics of gifted students

Based on research which has predominantly included children with high measured general intellectual reasoning (such as high IQ scores), common characteristics of students with high intellectual ability are that, compared with age peers, they may:

- Learn at a faster pace (Barnett, 2019; Jung & Worrell, 2017).
- Acquire language skills earlier (Syafril et al., 2020).
- Possess an advanced vocabulary (Smith, 2021).
- Gain early mastery of symbol systems (e.g., reading, maths and music) (Hodges et al., 2018; Walsh & Jolly, 2018).
- Have an ability to absorb and retain large amounts of factual knowledge (Walsh & Kemp, 2019).
- Demonstrate a greater depth of comprehension (Callahan, 2017).
- Possess higher levels of intellectual curiosity (Hanaa & Alia, 2020; Syafril et al., 2020).
- Possess an intensity of focus that enables them to concentrate for long periods on subjects or ideas that fascinate them (Jung & Worrell, 2017; Miedijensky, 2018).
- Have an advanced and unusual sense of humour (Hanaa & Alia, 2020).
- Express early idealistic standards and sense of justice (Callahan, 2017).
- Experience heighted sensitivity to the expectations and feelings of others (Callahan, 2017).
- Develop early abstract thinking and ability to manipulate ideas (Hanaa & Alia, 2020).

Not all students with high intellectual ability possess all these characteristics, and this is not intended to be an exhaustive list.

Definition of giftedness

The term "gifted and talented" continues to be problematic within literature due to a lack of consensus regarding the meaning (Henderson, 2018; Jung & Worrell, 2017). There are different perspectives on the definition of giftedness utilised worldwide (Jung & Worrell, 2017). Early definitions were focused on general intellectual reasoning ability, emphasising high measured intelligence (Terman, 1922). As the field developed in response to criticisms of IQ-based definitions as too narrow, subsequent definitions deliberately broadened the focus beyond what Renzulli (1982) termed 'schoolhouse' abilities to include creativity and a range of specific abilities involved in culturally-valued productivity and performance (e.g., Gardner's (1983) Theory of Multiple Intelligences). In addition, the emphasis shifted to factors that support the development of a broader range of natural abilities into talented or advanced performance (Gagné, 2010; Renzulli, 2016; Tannenbaum, 1986). These definitions marked a shift away from a sole focus on intellectual *potential* within an individual (which Dai and Chen (2013) calls *The Gifted Child Paradigm*) and towards the goal of supporting development towards high *performance* within a domain (Gagné, 2010), creative- productive behaviour (Renzulli, 2016) or the achievement of eminence (Subotnik et al., 2011). Dai and Chen (2013) summarise contemporary approaches to conceptualising giftedness in terms of the *Talent Development Paradigm* (e.g., Gagne 2010, Subotnik et al., 2011) and the *Differentiation Paradigm* which focuses on matching specific academic experiences to individual students' advanced knowledge and skills within the school curriculum (Peters & Matthews, 2021). Each of the three general paradigms have different implications for identifying and responding to gifted students, resulting in multiple possible approaches to gifted education.

This research is focused on the processes involved in establishing a specialist school, so it is beyond the scope of the thesis to present a detailed explanation of different definitions of giftedness proposed in the literature. However, the initial group's understanding of the nature and needs of gifted students, and the way giftedness is considered in the national and local context

contributes important background to the study. Currently, there is no national (Commonwealth-level) policy or definition for the education of gifted children, or even a statement of what giftedness is, despite a recommendation of a Senate Inquiry into this issue (Southwick, 2012). The definition that is widely adopted—at least in policy documents— in most states of Australia (Merrotsy, 2017) is based on the Gagné (2010) Differentiated Model of Giftedness and Talent (DGMT). Gagné's DGMT recommends a clear distinction between the two most basic concepts in the field of gifted education:

> GIFTEDNESS designates the possession and use of untrained and spontaneously expressed superior natural abilities (called aptitudes or gifts), in at least one ability domain, to a degree that places an individual at least among the top 10% of his or her age peers.
>
> TALENT designates the superior mastery of systematically developed abilities (or skills) and knowledge in at least one field of human activity to a degree that places an individual within at least the upper 10% of age peers who are or have been active in that field or fields. (Gagné, 2010, p. 83)

This conceptual model of giftedness provides a theoretical framework to explain the nature of giftedness and certain catalysts (environmental, intrapersonal, and developmental) that interact with the development of talent (Gagné, 2010). This suggests that talent can develop in the school environment, given the right circumstances (Henderson, 2018).

Gagné's model, although commonly quoted and used to influence policy in contemporary educational settings (Pfeiffer, 2012; Pfeiffer, 2018), is criticised for providing limited guidance in terms of operational definitions and programming options to address the development of natural abilities in a school context (Merrotsy, 2017; Moon, 2006; Worrell et al., 2019). Henderson (2018) reminds us that, for an operational definition within a school context, only some of the talents included in the model are relevant for guiding identification of and provisions for gifted students.

Whilst several state and territory departments of education have referred to Gagné's model in their policy documents, Australian schools are not obliged to follow any specific definition of

giftedness (Jung & Worrell, 2017). In this study, the definition of giftedness that was selected by the initial establishment group shares similarities with Gagné's conception and also fits within the Talent Development Paradigm. This definition comes from a comprehensive article by Subotnik, Olszewski-Kubilius and Worrell (2011) in which they review the historical development of research evidence about giftedness and gifted education and propose a way forward which emphasises systematically fostering domain-specific talents. As discussed in a later chapter, the group in this study considered this definition to provide a framework for understanding the stages of development as well as the processes and timing involved in talent development (Worrell et al., 2019) and to identify a combination of cognitive and psychosocial variables that influence giftedness. Subotnik et al. (2011) define giftedness as:

> …the manifestation of performance or production that is clearly at the upper end of the distribution in a talent domain even relative to that of other high-functioning individuals in that domain. Further, giftedness can be viewed as developmental, in that, in the beginning stages, the potential is the key variable; in later stages, the achievement is the measure of giftedness; and in fully developed talents, eminence is the basis on which this label is granted. Psychosocial variables play an essential role in the manifestation of giftedness at every developmental stage. Both cognitive and psychosocial variables are malleable and need to be deliberately cultivated. (Subotnik et al., 2011, p. 7)

The key principles embodied in this definition are that "abilities are malleable, opportunities must be offered at the right developmental time and that development of talent is a long-term endeavour, extending beyond school years" (Hamza et al., 2020). Furthermore, Subotnik, Olszewski-Kubilius, and Worrell, (2011) suggest gifted individuals often must accept responsibility for their growth to eminence and receive appropriate psychosocial supports at each stage of their development.

Educational approaches for academically gifted students

It has been acknowledged that while some recommended practices in gifted education have a well-developed evidence base, there is a need for further research in the field (Plucker & Callahan, 2014). In establishing a new specialist school for gifted students, the initial group had to consider and select a

range of appropriate practices. The focus of this study is on the processes involved in establishing a specialist school rather than the design or content of an educational program for gifted students. However, in order to provide contextual background for some of the decision making, the following section offers a brief overview of specific educational interventions that are recommended for gifted students.

Acceleration

Acceleration is a strategy used to allow a student to progress through school or a curriculum sequence at a faster rate than their age peers, and/or with older peers with whom they may be more cognitively and emotionally aligned (Gross & Smith, 2021), allowing for a better fit between the child's development and the curriculum. There are several forms of acceleration, including subject acceleration, grade skipping, and telescoping (where a student completes two academic years in one) (Gross & Smith, 2021; Kronborg & Cornejo-Araya, 2018). The benefits of acceleration are well documented within the research literature (Worrell, 2018) and a meta-analysis study undertaken by Steenbergen-Hu et al., (2016) concluded that acceleration had a positive effect on gifted students' achievements and a neutral or slightly positive effect on socio-emotional development.

Enrichment

Enrichment refers to richer and more diverse educational experiences, as the curriculum is modified to provide greater depth and breadth than is commonly provided (Plucker & Callahan, 2020; Westwood, 2018). Enrichment activities build on the use of higher-order creative and critical thinking skills, ethical reasoning, and authentic problem solving (Henderson & Riley, 2018), enabling the student to explore the subject in-depth (Kim, 2016; VanTassel-Baska & Baska, 2019).

A meta-analysis undertaken by Kim (2016) concluded that enrichment had a positive effect on gifted students' achievement and socio-emotional development. Additionally, gifted students' self-esteem and self-concept were viewed as improved with appropriately supported enrichment

(Gross & Smith, 2021). However, schools and teachers often discount enrichment measures as time-consuming and expensive, which may become a barrier to the provision of enrichment (Renzulli & Reis, 1994; Renzulli et al., 2020) for gifted students.

Independent learning

Independent learning is another technique used by educators that offers student autonomy and challenge in the learning process (Winebrenner & Brulles, 2020). Betts (2004) regarded independent learning as the highest level of knowledge because it connects the interests and readiness level of the individual student to essential critical thinking skills, which are both desirable pedagogies for gifted education (Cohen et al., 2013; Maker & Nielson, 1995; Powers, 2008). Research suggests that independent learning is also typically preferred by gifted students (Dunn & Griggs, 1985; Maker & Nielson, 1995; Renzulli et al., 2020) who report finding it more rigorous and challenging, leading to the acquisition of deeper learning (VanTassel-Baska & Hubbard, 2016).

Ability grouping

Ability grouping involves "placing students into different classrooms or small groups based on their initial achievement skill levels, readiness, or abilities" (Steenbergen-Hu et al., 2016, p. 850). The core purpose is to create a more homogeneous learning environment so that teachers can provide instruction better matched to the particular group of students' requirements, and allow students to benefit from interacting with their comparable academic peers (Steenbergen-Hu et al., 2016). There is significant research that suggests there are positive impacts on academic achievement for gifted children who are ability grouped (Coleman & Cross, 2006; Gross & Smith, 2021; Preckel et al., 2019; Rogers, 2007; Steenbergen-Hu et al., 2016).

Problem-based learning

Problem-based learning (project-based, design-based) uses open, authentic problems to allow students to work at their level of depth and complexity, as well as at an individual pace (Maker & Wearne, 2021). The teacher, in this context, acts as a facilitator of the learning process rather

than a provider of knowledge (Maker & Wearne, 2021). Literature on problem-based learning has continued to highlight the benefits of complex thinking with problem-based learning (Liu et al., 2019). This significantly enhances academic achievement (Horak & Galluzzo, 2017; Kusumah et al., 2020; Liu et al., 2019) and positive experiences for students, including motivation and social connections (Merritt et al., 2017).

Home schooling for gifted students

The idea that parents have more choice as to which school they send their child to has gained traction over the past twenty years. In the same timeframe, home schooling has become an increasingly popular alternative to the traditional schooling system (Slater et al., 2020). While most families home-school for religious reasons (Slater et al., 2020), home-school families have grown to represent a more varied population who are disillusioned with the public school system in other ways (Isenberg, 2007; Slater et al., 2020). It is interesting to note that, despite some scepticism about its benefits, there has been a recent surge of families of gifted children choosing to home-school after their needs have been overlooked in the traditional school system (Lubienski et al., 2013).

Research suggests home schoolers in general tend to cite different reasons for their home schooling than do families with gifted children. The choice to enter into home schooling by families with gifted children is often due to the perception of inadequate services for gifted children in mainstream schools (Conejeros-Solar & Smith, 2019; Jolly et al., 2013), and the perception of little or no academic growth for gifted students in schools (Conejeros-Solar & Smith, 2019; Goodwin & Gustavson, 2009; Jolly et al., 2013). Conejeros-Solar and Smith (2019) also cite a perceived mismatch between the traditional school and gifted children's learning needs. For parents, the decision to remove a gifted child from the mainstream education system appears to be the final result of a combination of factors (Jolly et al., 2013). The Australian Education Authorities agree that "parents

had the right to determine the education of their children but also acknowledged the state's need to be assured that the children's right to an education was upheld through family practice" (Jackson, 2017, p. 342).

In conclusion, the overall sentiment is one of equity; families are dissatisfied with the current level of education being offered and support for social and emotional wellbeing. Policy needs to address and support the diversity within classrooms, by providing teachers with professional learning and resources (Slater et al., 2020) to accommodate children.

Implications for schools for gifted students

Students with high intellectual potential require a curriculum that caters to their learning needs (Australian Curriculum Assessment and Reporting Authority (ACARA), 2016). Advice from ACARA provides examples of how the flexible design of the Australian Curriculum can be used to accomplish this; yet, still, the focus is on age-equivalent learning and not on intellectual ability. The research undertaken to date suggests that teachers find it challenging to adjust their methods of classroom instruction to differentiate curriculum according to students' abilities (Brock et al., 2019). Van Geel et al. (2019) found that, while there appears to be a degree of understanding of differentiation, this discourse is rarely transferred into practice, despite evidence that differentiation, when done well, is an effective approach. Without differentiation, students with high intellectual ability are at risk of underachieving, disengaging from learning, and/or developing emotional and behavioural difficulties (Bondie et al., 2019). To optimise learning for gifted students, instruction must match ability (Alshareef, 2018); therefore, consideration for curriculum design and a differentiated approach is an important element when designing a specialist school.

Teacher competencies for gifted students

To be successful in their learning, students with high intellectual potential require specifically educated teachers (Kronborg, 2018a; Plunkett & Kronborg, 2019). Outstanding educators of gifted students "demonstrate particular characteristics and competencies, using a range of teaching practices to achieve optimal learning experiences for their gifted students" (Kronborg, 2018a, p. 84). Studies have shown that teachers with specialised training in gifted education have the capacity to create better learning environments and employ more effective strategies to enable learning for students with high intellectual potential (Kronborg & Cornejo-Araya, 2018; Rowley, 2008). A study by Plunkett and Kronborg (2019) found that teachers in specialist programs went beyond the usual expectations of a classroom teacher and provided additional intellectual stimulation and challenge within the curriculum.

Education policies throughout Australia specify the need to support the social and emotional development of gifted children (Department of Education and Community Development, 2016) who may require specific strategies to support and nurture them, not only academically, but also socially and emotionally (Long et al., 2015; Vialle & Rogers, 2012; Worrell et al., 2019). Therefore, teachers require knowledge and capabilities to foster specific skill development which must be programmed within the curriculum context for these children (VanTassel-Baska & Baska, 2019). Gifted students need to be taught to know themselves – their capabilities, strengths, and possibilities (Gross & Smith, 2021).

Recognising the unique characteristics of these students and developing their skills is a precursor to enhancing their academic achievements (Smith, 2017). Furthermore, students with high intellectual ability may require different educational experiences in order to achieve positive intellectual, social and emotional development (Papadopoulos, 2020). Schools are responsible for providing all students with educational opportunities commensurate with their natural ability (Gross & Smith, 2021; Henderson, 2007). However, the majority of students with high intellectual ability in

Western Australian primary schools "spend at least ninety percent of their time at school in regular, heterogeneous classrooms with learning expectations based on a common curriculum" (Taylor, 2016).

At a system level, provisions for gifted children have not substantially changed in Australia since a Senate inquiry in 2001 (Kronborg, 2018b). The inquiry reported that, where there were provisions for gifted students, these programs were often ineffective and implemented by teachers without sufficient professional education in the needs and education of gifted students (Collins, 2001). Similarly, in their research into provisions for gifted students in South Australia, Jarvis and Henderson (2012) highlighted that:

> Gifted education in SA, where it is recognised at all, may tend to be viewed as an 'optional extra' to which schools are likely to attend only if there is time and money available once other priorities have been addressed… (p. 20).

Jarvis and Henderson's research (2012) further echoed the sentiments of previous Senate reports that a majority of teachers had received little to no professional learning related to teaching gifted students, or "that workshops tend to be 'ad hoc' rather than part of any systematic plan integrated with other school priorities" (p. 21).

Professional development in gifted education for teachers is an important component in fostering effective education of gifted students. Class teachers are largely "unaware of the negative effects of mixed-ability grouping on gifted students" (Taylor, 2016, p. 234). Taylor's research found that "teachers commonly hold stereotypical beliefs about giftedness that influence their perceptions about the need to develop both their understanding of giftedness and ability to differentiate learning" (2016, p. 255). Finding ways to provide professional development to teachers, where there is not the understanding or motivation to engage with the problem, is another area of concern for the education of students of high intellectual ability (Geake & Gross, 2008; Jarvis & Henderson, 2012; Matheis et al., 2019; Rowley, 2012).

Provision of specialist schools for gifted students

Education reform since 1994 has promoted an inclusive education that stipulates that students with special educational needs have access to the regular classroom (Ainscow, 2020). The term *inclusive education* has expanded to capture all students with varying educational needs. There are a range of views about the education of gifted students and there are arguments for and against specialist programs in gifted education.

A selective or separate school approach for gifted children has been criticised by some as 'elitist', with the gifted population being advantaged and these students receiving special provisions, resulting in a less equitable education system (Peters et al., 2020; Rasmussen & Lingard, 2018). That is, specialist programming is seen as not reflective of the inclusive philosophy and egalitarian ideals of our democratic society (Robbins, 2019). Some have argued that selective schools are currently a long way off from promoting inclusion and equity and are gradually placing socio-educationally advantaged students into a class of their own (Black, 2019). NSW has more selective high schools than any other state in Australia and these schools cater for high achieving students (often referred to as gifted and talented) (Black, 2019). Entry into these schools is based on a placement test and seems to be merit based; however, according to Ho and Bonnor (2018) these selective schools are all but inaccessible to most students, with parents spending substantial money on private tutors in preparation for their children to take the placement test to ensure they gain entry into a selective school (Doherty & Dooley, 2018; Ho & Bonnor, 2018; Sriprakash et al., 2016). On average, the students who attend these schools are from the top 25 per cent of socio-educational advantage, mirroring the profiles of prestigious high-fee private schools in Sydney, which have high academic records (Ho, 2019).

While parents in Australia are paying tutors to achieve entrance into selective schools, as the common belief is that you will ensure your child's future success by attending a school with high achievement scores, this may not necessarily be in the student's best interests. A longitudinal study

spanning 50 years, undertaken in the United States by Göllner et al. (2018), addressed selective schools from the 1960s, and the short and long term effects of placing a child in a selective school. Göllner et al. (2018) examined two aspects of school composition: socioeconomic status of families attending and the overall achievement levels of the school. The study "showed that selective schools bring a mix of advantages and disadvantages for students' academic self-evaluations and individual paths" (Göllner et al., 2018, p. 1794). Attending a high achieving school with a high socioeconomic composition was linked to negative outcomes decades later in life, including lower educational expectations and income. The long-term effects of negative social comparisons among a population of largely talented students were possibly implicated in the results, which led to lower educational beliefs of oneself. According to the findings, the optimal combination for the best long-term outcome is to attend a selective high school that has a high socioeconomic composition with a modest achievement result, which is counterintuitive to parents' beliefs. As Göllner et al. (2018) suggests, there is no simple answer as to what kind of school to attend.

In addition to concerns about socioeconomic inequality, a selective school which encompasses full-time grouping and acceleration is viewed by some as potentially detrimental for the social and emotional development of gifted students themselves (Gross & Smith, 2021). Other criticisms include that ability grouping and acceleration promote achievement gaps and entrench the stratification of educational opportunities and separation from same age peers (Steenbergen-Hu et al., 2016). However, Rogers (1991) and Kulik (1992) argue that full-time ability grouping of gifted and talented students can produce significant academic gains, which have flow on effects for self-esteem and well-being (Gross & Smith, 2021). Steenbergen-Hu et al's (2016) meta-analysis supported this claim, finding that the majority of evidence accumulated "over the past century suggests that academic acceleration and most forms of ability grouping… can greatly improve K-12 students' academic achievement" (p. 893) as well as being associated with social and emotional benefits from being with likeminded peers (Gross & Smith, 2021). The long-running Study for

Mathematically Precocious Youth (SMPY) in the United States provides further evidence in support of academic acceleration through selective programming (Worrell et al., 2019), in terms of both achievement and social-emotional outcomes; this research has found that engaging with learners like themselves in an accelerated program provided gifted students with social support, resulting in decreased feelings of isolation and difference (Rinn, 2018). Furthermore, MacFarlane (2018) reported that graduates of specialist programs express satisfaction with their education in addressing their particular characteristics associated with giftedness.

In this study, members of the group were aware of the arguments against selective schooling, the policy shift towards inclusive education, and the value of professional learning to support teachers to challenge and support gifted students effectively within mainstream schools (Henderson & Riley, 2018). Nevertheless, most members of the group came to the project with personal experiences of frustration with the perceived failure of mainstream schooling to address the educational needs of gifted students. These experiences are consistent with the research literature (Coleman et al., 2015). that there was a need for a separate school, even though this was not consistent with the inclusive ideals of the education system, with a focus on providing support for students who did not fit into mainstream and had experienced marginalisation or exclusion. Adopting such an approach requires engagement with the education system to gain approval, accreditation, support, funding, and the understanding of research to be aware of the issues to date.

Australian Education System

Because this thesis addresses the issues relating to establishing a school, this section provides baseline information regarding the macro structure of education in Australia and South Australia as a background to the challenges faced in the study that will be reported in chapter 4. Thus, descriptions of the Australian and South Australian educational context for gifted education follows including:

- Education at the Federal Level
- Gifted education in South Australia
- Impact of changes in education

Education at the federal level

In Australia, there are two classifications of schools: those run by the government and those run by independent non-government bodies (based on a range of religious affiliations or specialised orientations) (Connell, 2013; Kronborg & Cornejo-Araya, 2018; Kronborg & Plunkett, 2013; Mohajeran & Ghaleei, 2008). In 1901, under the Federal Constitution in Australia, States (and Territories) were assigned responsibility for the establishment, governance, and funding of schools (Harrington, 2011). However, a pivotal change occurred in 1964 when the States Grant Act was passed. This act extended capital funding to non-government schools, paving the way to broaden funding for science laboratories and equipment (Cranston et al., 2010) and reflected a change in the sources of funding by both Federal (Commonwealth) and State Governments (Freebody et al., 2010).

Under the Whitlam government (1972-1975), Australian education experienced powerful and notable reforms (Niesche & Thomson, 2017; Proctor et al., 2015). The *Karmel Report*, produced by the Interim Committee for Schools Commission, advised the Whitlam government to make a significant increase in public investment, with equitable distribution of funds based on need, to improve the overall quality of Australian education (Collins & Yates, 2009; Connors & McMorrow,

2015). The understanding at this time was that resources should be allocated based on need and, based on this premise, the *Disadvantaged Schools Program* was implemented (Collins & Yates, 2009). Several other recommendations were made, including to increase funding to both government and non-government schools (O'Donoghue, 2000). There was also advice regarding more democratic educational decision-making practices at the local level, which resulted in the implementation of school boards or councils in state schools (Caldwell & Spinks, 1998; Clinch, 1977; Niesche & Thomson, 2017) which brought schools and communities closer together (O'Donoghue, 2000). These interventions weakened the centralised education system at the same time, fostering a decentralised system that allowed greater autonomy at the local level (Marginson, 1997; Thompson et al., 2021). Schools' governors at the time had increased capacities to determine how funds would be spent and curricula developed to ensure that the relevant local needs were attended to, based on an assumption that this would improve outcomes for all students. In addition, school governing bodies were now responsible for the interpretation and implementation of government school regulations in this decentralised model. These changes marked a significant transference of responsibility for school regulations from Federal to State (and Territory) government and then on to the school governing bodies (Thompson et al., 2021).

The Hawke Labor Government (1983 to 1991) pursued economic liberalisation, privatising some government corporations, and increasing federal government spending on schools. Schools were given policy powers within a framework that was governed by state legislation, thus providing further funding to schools (Caldwell & Spinks, 1998). The *Quality of Education in Australia Report: report of the Review Committee (1985)* was underpinned by notions of economic rationalism. To align education nationally to the needs of the market, it now functioned with identifiable education outcomes (O'Donoghue, 2000) that entailed greater accountability of schools and pioneered a shift from social democracy to neoliberalism (Proctor et al., 2015). The argument for this neoliberal

emphasis was based, and continues to be based, upon efficiency and international competitiveness, and contributed to economic health and prosperity (Connell, 2013).

In 1988, a Senate committee was appointed by the Australian Government to report on gifted education in response to a significant increase in interest and activities in this field. The report of this inquiry highlighted a lack of teacher preparation in the field of gifted education and a need for gifted education programs in schools (Collins, 1988). As a result, gifted and talented policies and programs were established throughout many Australian schools, with an increase in provisions for government schools with specialised programs, professional development, and limited post-graduate training opportunities in gifted education (McCann, 2005).

Subsequently, the Howard government (1996-2007) shifted from a social-democratic focus that valued social proficiency of school performance and recast education in line with market modes of governance (Cranston et al., 2010). A key feature of this government was the amount of funding devoted to schools (Gurr, 2020), in which schools were given control over several million dollars of non-capital expenditure, which, Caldwell and Spinks (1998) note, allows schools greater autonomy in staffing and allocating resources to local priorities. Simultaneously, the federal government passed the *Disability Discrimination Act 1992* which focused on including children with disabilities in classrooms, an intended shift to inclusive education that gained significant momentum. Inclusive practice is reflected by the *Melbourne Declaration on Educational Goals for Young Australians* (MCEETYA) which determines government policy (Barr et al., 2008; Boyle & Anderson, 2020). The same sentiments were reiterated in the Alice Springs *(Mparntwe) Education Declaration* (Education Council, 2019), with an emphasis that education is expected to ensure that all students are able 'to reach their potential and achieve their highest educational outcomes' (Education Council, 2019, p. 17) and commit to 'national values of democracy, equity and justice'(p.8). "Equity is not about giving all students the same education, but giving all students equality of opportunity to access and engage

with learning experiences that are appropriate to their individual needs" (Henderson & Jarvis, 2016, p. 64).

The Rudd Labor government (2007-2010) commissioned David Gonski to chair a committee to overhaul funding to schools, known as the *Educational Revolution,* designed to make schools more accountable and open to consumer choice (Savage et al., 2013). In 2008, the National Assessment Program – Literacy and Numeracy (NAPLAN) (Dempsey & Davis, 2013) was introduced to assess literacy and numeracy levels in each state. Three years later, the Australian Curriculum, Assessment and Reporting Authority (ACARA) was established to improve the learning of all young Australians through world-class national school curriculum, assessment, and reporting.

Gifted education in South Australia

In 1993 the state government of SA provided funding to six South Australian Government primary schools, each with a coordinator to promote gifted education methodologies and practices within schools. Furthermore, a Gifted Policy Officer was appointed within the Education Department in 1993. In 1997, funding for gifted education was removed from primary schools, and the coordinators were no longer funded. Instead, funding was directed towards the development of a selective entry class at each of three dedicated government secondary schools (Ignite Schools) for gifted children (McCann, 2005). Finally, the position of Gifted Policy Officer within the Department of Education and Child Development (DECD) was made redundant in 2007 (Jarvis & Henderson, 2014).

In September 2020, the Gifted and Talented Children and Students Policy (2016) was replaced by the Department for Education (DfE) with a *Curriculum, pedagogy, assessment, and reporting: early services to year 12 Policy* (2020), providing direction and expectations for teachers in the delivery of the curriculum. The new policy recommended that gifted students require a differentiated curriculum to foster well-being and reduce the risk of learners underachieving.

However, within this policy there is no definition of gifted, nor is there information on how to identify a gifted child. Furthermore, a 'one plan' (individual education plan) must be completed for gifted students (p. 4), but who undertakes this plan is not evident.

Impact of changes in education

It is important to note that the Australian Educational reforms over the past two decades have avoided the issue of parent involvement in school decision-making (Keddie, 2017). As a result, some parents have become disillusioned with the current context of education, because market logic has produced social inequalities (Connell, 2013). High stakes testing programs hide underlying social, gender, and racial issues that permit a system to produce great results for some, but not all. The results of the Programme for International Student Assessment (PISA) demonstrate that Australia has a world-class education system (Baroutsis & Lingard, 2017; Thomson & De Bortoli, 2008). However, Klenowski (2012) states "international and local research indicates that teachers need experience and tools to assist them in the productive use of assessment" (p. 18). Masters (2015) contends that teachers need to recognise strengths and achievement levels of students when planning curriculum. It is an issue of equity that schools fail to support highly able students in their learning needs. Jolly and Walsh (2018) stated "that despite pockets of excellence, gifted education in Australia remains fragmented and inconsistent, reliant more on the goodwill of principals, and the efforts of a few dedicated teachers and parent advocates, rather than on a well-designed systematic approach" (p. 87).

The political climate over the past six decades has seen changes that have led to an increase in education funding. The Gonski report highlighted the need for accountability and transparency to ensure that funding (Savage et al., 2013) is distributed based on the requirements of individual schools. Supported by economic liberalism, schools have been given more autonomy to make decisions that can meet the needs of the education market with the intent of providing parents with

more choice regarding their children's education. Consequently, these education reforms have paved the way for new types of independent schools to be designed that focus on alternative spaces and curricula for specific groups of students. The current political ideology has enabled groups of parents and teachers to come together in a united front to design a new type of school.

Research on Establishing a New School

In 2015, there were 9,404 schools in Australia, representing an increase of 15 schools overall from 2014. This increase in new schools included 15 Catholic schools and 12 independent, while at the same time 12 government schools were closed (Australian Bureau of Statistics (ABS), 2015). Little is known about why these new schools were established and what was involved in their establishment. The establishment period of a school is a unique and distinctive stage of a school's life, largely because this phase is rarely repeated by the same group of individuals or with the same intent (Nicholas, 2008). Within literature, there is little research regarding the establishment stage of a school in an Australian context (Collier, 2001; Douglas, 2012; Nicholas, 2008). After an extensive review just three studies were found: Douglas and Nicholas were single school studies, while two focused on multi-school studies, first was Evan's and Lake's study and secondly Collier's study.

Collier (2001) undertook a study of 19 new schools in 5 different states of Australia. The research showed the "importance of the initial establishment period for the determination of a specific culture and marketable stance for the new school" (Collier, 2001, p. 159). Collier (2001) revealed the leadership team is crucial during the foundation period, to establish a reputation and ethos, as well as credibility, in order to capture the competitive enrolment market to ensure the long-term viability and credibility of the new school. The study also identified important key elements of the curriculum, school structures, student welfare and special programs, and described the importance of procedures used to establish the ethos, mission, vision, and collaboration. Collier (2001) highlighted some important assumptions in relation to new schools:

- Ethos and culture are encapsulated in school-based innovations that are specific to the school's context, and form part of the school's market niche.
- Ethos was also found embedded in the foundation school documents, and these documents were utilised to interpret the future as a strategic management plan or to inform a philosophical underpinning for the new school.
- Role of leadership was crucial in the development of the school.
- School leaders tended to have a clear vision of the school's future and drove the development of the foundation documentation in the school's development.
- All new schools face considerable challenges: it is how they are creative and supportive in response to those challenges that will affect the success of the school.
- Predominant challenges include a need to drive enrolments, to sustain future program development and to establish the credibility of the school.
- Community collaboration is important to create a sense of ownership and to develop a distinct culture. Student welfare initiatives were seen as proactive and supportive of a culture of learning.

Evans and Lake (1988) case study of three new schools in Queensland identified that, although principals were aware of the crucial nature of the school's foundation period, they found themselves caught in a tension between possibilities for innovation and the traditions and expectations of the *system*. How a school is initially opened and occupied informs the community of the academic rigour of the school. Evan and Lake's study saw the first year as a "make or break" time for a new school. Furthermore, they suggested that establishing a curriculum and practices to suit the students can be constrained by the controls of the system.

Research conducted by Nicholas (2008) evaluated the first two years of establishing a Catholic High School in Sydney from an insider perspective, and focused on the challenges and issues faced, and what structures were vital when establishing a school. The principal had been appointed fifteen months prior to the school opening, with key responsibilities being to facilitate foundation and development of the school and to employ staff. Three months before the school opened, the principal appointed an information manager to look after school resources, an Information and

Technology Coordinator, and a Curriculum Coordinator. Nicholas (2008) argued that the principal's role was key in the foundation of a school through the demonstration of leadership based on his or her philosophy and vision for the school. The principal was a significant factor in establishing sustainable practices and "whether these practices would be sustained after [his or] her departure" (Nicholas, 2008, p. 192).

The high school in Nicholas' study initially occupied a temporary site and was due to move to a permanent site, however, a considerable debate occurred, and the school did not move until four years later. Nicholas (2008) highlights that this was due to external forces (local council, state government, and system leaders). Another significant issue was that 40% of staff left the school at the end of the second year, citing four key factors: "not having a permanent site, tensions between founders and second-year staff, a system not delivering on its promises, and the school … starting to become like any other school" (Nicholas, 2008, p. 193). Tensions between founding staff and second-year staff emerged when new staff felt that they did not have ownership of the vision. It was evident that "attention must be paid to developing the vision through a process of communication and collaboration…and then through a continual process as the school grew" (Nicholas, 2008, p. 194).

Effective communication and decision-making were seen as fundamental attributes for success, as they had a direct impact on the work of teachers. The most effective form of decision-making and communication is through a collaborative approach (Nicholas, 2008). A concern Nicholas' study raised was related to the operating and managerial functions of the school, including appropriate timetables, adequate resources, and duty rosters. The school started with a small number of staff and structures were developed as needed. An enormous amount of pressure was placed on staff during the first year, as structures and processes were collectively developed. Professional development was considered important by the teachers in the first year and Nicholas

(2008) stated that the amount and type of professional development seemed suitable to the needs of teachers. Having mentors to support new staff in the new school was considered to be of critical importance, as there was a disproportionate amount of pressure on all staff. It is important to consider the issues raised by Nicholas (2008) when planning a new school.

Douglas' (2012) case study focused on the establishment of an independent bilingual school in Victoria. Douglas (2012) argued that it was important to undertake her research because the phenomenon of establishing a new school warranted it. She described and recorded what had happened during the foundation years before key players left and memories faded, noting that "Having an understanding of the school's history might also assist those involved in framing the school's future" (Douglas, 2012, p. 24). Creation of an independent bilingual school had been originally conceived from within the German-Australian community. The research highlighted two distinct phases: a founding phase (2004 through 2008) and an establishment phase (2009 through 2011). Douglas found that the foundation phase required motivation and enthusiasm to set the scene for establishing structures, processes, and relationships to guide the school, whilst the establishment phase occurred when the school started operation.

Douglas (2012) described meetings in the founding phase, the first of which occurred in 2004 and was called to determine the level of support espoused for the establishment of the school. Several weeks later, a second meeting was held to attract further support and find key drivers, focussing on the foundation of the school's association and the formation of the founding school board. These meetings represented key steps in the formation of the new school. Douglas (2012) called the next step in the founding phase "developing the machinery". During this step, the founding school board's earliest task was "to create a corporate identity" (Douglas, 2012, p. 37). The board also realised that there was a significant amount of research required to set up a school and three working parties were formed: a curriculum group, marketing group, and building group.

According to Douglas (2012), these groups formed naturally and were based on people's professional lives, leading to a highly skilled team of people who volunteered their time in areas of expertise.

Finding a site is pivotal to the success of a new school. As Douglas (2012) mentions, there was a failed attempt to find a site, due to "issues about finding a building space and money that led to them not succeeding" (p. 36), with Douglas noting that "these were also the two areas that presented the greatest challenges to the creators of the [school]" (p. 36). A new chair was appointed to the school board, and, under his leadership, a school site was secured in 2007. Douglas described the leadership style of the new chair as revolving around the interactions of leaders and followers in various situations.

In the first year of operation, the school opened without a principal because "we couldn't afford a principal…we had a lot of debt" (Douglas, 2012, p. 45), with tasks normally undertaken by a principal distributed amongst the board, teachers, and parents. Having no principal was a unique feature of this study and Douglas (2012) described the utilisation of a distributive leadership model, with many issues and matters needing to be clarified that the founders had not anticipated. Douglas (2012) describes a shift in focus from planning to trying to establish a school. Specific procedural "issues emerged once the school became a reality…", with people "being pushed to their limits" (p. 47) yet being persistent and imaginative in resolving issues and completing tasks. The process in the beginning was described at times as "trial and error", and, as the school developed over time, the processes became more transparent, concise, and clear. "What carried the school through its first year was its vision" (Douglas, 2012, p. 47).

From these three studies conducted by Collier (2001), Douglas (2012), and Nicholas (2008), the following key factors emerged that are important in establishing a school and will be important considerations in the analysis of this thesis:

- Articulation of a clear vision.
- Explicit educational philosophy.
- Identifiable leadership.
- Program of marketing.
- Community involvement.
- Recognisable school community.
- Collaboration between all stakeholders.
- Commitment and persistence.

Regulations for Establishing a New School

Education in Australia is overseen by the Federal (Commonwealth) government, with educational provision being the responsibility of each state or territory (Mohajeran & Ghaleei, 2008). Each state and territory has a department of education with different authority arrangements for the management of government schools. Gurr (2020) stated there is a "complex interplay between these different levels of government involving nine education departments, and between government and non-government schools" (p. 311). The Federal government provides funding to all schools and further influences them by requiring them, under the *Australian Education Act 2013,* to develop a recognised curriculum, to undertake a national assessment program in literacy and numeracy, and to report publicly these results to the community. In SA, the Department of Education is responsible for public schools and has the responsibility to distribute state and federal funding to all schools.

Non-government schools in each state and territory has a registration authority that determines the conditions for registration. In SA, the body is known as the Education Standards Board and originally worked within the legislation of the *Education Act 1972 (SA).* However, this act

did not come into play until 2017 with the *Education and Early Childhood Services (Registration and Standards) Act 2011*, providing standards and guidelines for the registration of new non-government schools, replacing a policy document that was difficult to interpret.

For new non-government schools, application for funding cannot occur until the first official school day the school starts to operate. The applicant must provide a copy of the constitution, be not for profit, be registered in their state, and be a body incorporate to receive the federal funding, which is payable in July that year.

The new school in this thesis was developed under the old *Education Act 1972 (SA)* as the new policy was not enacted until 2017. The requirements to register a school under this policy required the following:

- articulate and provide an educational philosophy and curriculum policy, including the curriculum framework,
- describe the pedagogical approach,
- identify resources for students,
- provide an overview of assessment and reporting,
- ensure adequate provision for the safety, wellbeing, and welfare of students,
- gain zoning approval from the local council and,
- create an enrolment development plan and staffing allocation for the next five years.

Regulations at both state and federal level provided information that at times were difficult to interpret. Registration requirements at the state-level provide "what" documents are required, yet do not explain "how" to achieve the parameters, and it was left for the individual to interpret and innovate.

Change Management Models

While definitions vary, change management generally refers to the approaches to prepare and implement organisational change (Stouten et al., 2018). The change management strategy has attracted many frameworks and different authors have prescribed key stages to ensure successful organisational change (Makumbe, 2016). Over the years a number of models have been developed, the most popular and widely used (Brock et al., 2019; Stouten et al., 2018) are briefly described in Table 1.

Table 1

Policies prepared before attaining registration

Models of change management models	Description
Lewin's change management model	Linear model of change management model developed in 1952 defines three stages of change, that is; unfreeze, change, refreeze (Hussain et al., 2018)
Deming cycle (PDCA model)	Is a sequence of actions that focus on improvement. The cycle is designed to solve problems and implement new solutions (Jagusiak-Kocik, 2017). The acronyms stand for Plan, Do, Check and Act.
Bridges Transition Model	Focuses on how people feel during the change process. In this manner it provides a broad framework for communication elements during each of the phases (Bridges & Bridges, 2019).
McKinsey 7s model	Focuses on processes centred around the alignment of seven fundamental elements of any organization: Strategy, Structure, Systems, Style, Staff, Skills and Shared Values (Cox et al., 2019).
ADKAR model	Focuses on a people-centred approach developed by Hiatt (2006)to facilitate change at the individual level and provides the manager in each step a different role to understand and assist in order to make effective change (Stouten et al., 2018).
Kotter's eight-step change model	A process that uses employee's experience to reduce resistance and accept change (Kotter, 1996).
Judson's Five Steps	Distinguishes five steps in the change process: analysing and planning the change, communicating about it, gaining acceptance for the required changes particularly in behaviour, making the initial transition from the status quo to the new situation, and consolidating the new conditions and continuing to follow-up to institutionalize the change. (Stouten et al., 2018).

Establishing a school with a special interest is tantamount to a change process. Proposing a uniquely focused school represents a change in expectations about education and requires those

leading and engaging in its development and operations to adopt and accept different management roles. Thus adopting a change model provides a useful framework for supporting the change process, allowing an organisation to understand the challenges they are confronting and to identify and effectively manage the change process (Bowles & Scull, 2018).

Change management models are intended to provide a guide for leaders to follow during a time of evolution and flux. For this thesis, which is a retrospective review of a change process, namely, the establishment of a school for gifted students, Kotter's (1996) eight-step change model was selected because it seemed to provide a basis for practical adoption, providing specific stages that would help to illustrate the school's development along a timeline. These stages supported the reflection on what had occurred and the development of a narrative to describe the process. A more detailed outline of Kotter's change model now follows.

Kotter's Model for Managing Change in Organisations

Kotter described his model as , "intuitive and relatively easy to accept" (p. 776), because he had based it on his own 'lived experiences' in his business as well as observed it in his research observations and analysis of other companies. Kotter expanded on the scope of his original eight-step process to a newer version in 2014 (Solano & Preuß, 2019) because he had found that during the dynamic growth period of an organisation, people took risks and were guided by a vision and organisations that evolved over time (Kotter, 2014). Kotter argued that an increasingly globalised economy and a rapidly changing world created strategic challenges that even an elaborate organisational hierarchy cannot manage. The revised structure that Kotter proposed was dynamic and consisted of a dual operating system that is a management-driven hierarchy working in concert with a strategy network (Kotter, 2014). The hierarchy does not change, yet it morphs incrementally and continuously, while the focus of the network is innovation and change. As organisations

“mature they evolve naturally towards a single hierarchal organisation at the expense of the entrepreneurial network” (Kotter, 2014, p. 22).

Kotter’s dual operating system is based on five principles that guide the network element in its development as an organisation's core operating system. A network should have (Kotter, 2014):

- Many change agents, not just the usual few appointees.
- “Want-to” and “get-to” mindsets – not just “have-to”.
- Head *and* heart, not just head.
- More leadership, not merely more management.
- Two systems, one organisation.

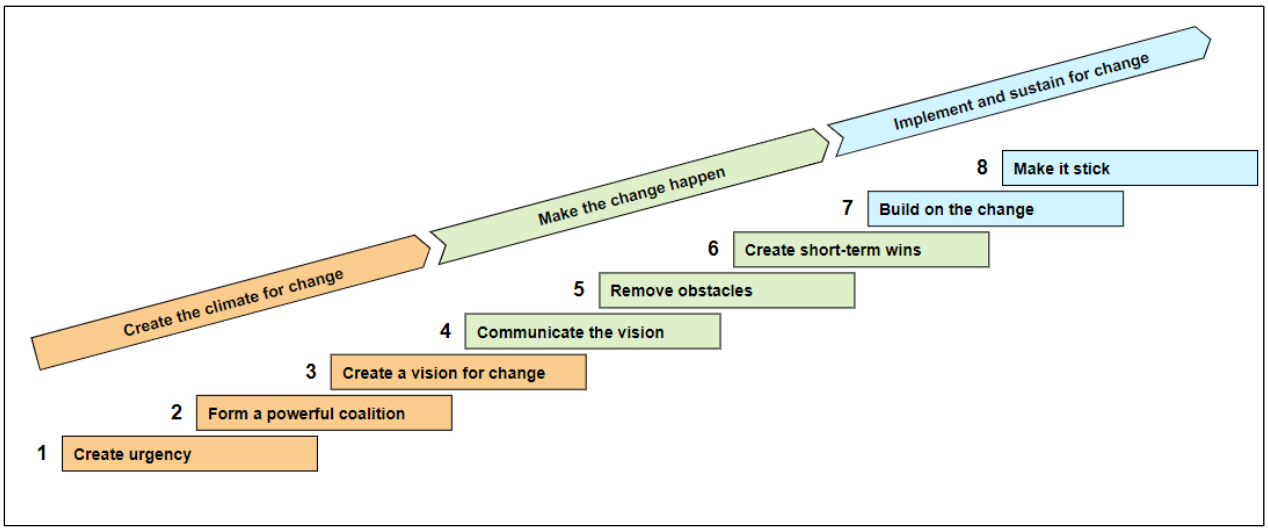

Figure 1. Kotter’s 8 Step Change model

Kotter's eight-step model, can be used to achieve this kind of organisation. The steps, known as activity accelerators or actions within the network (Leavy, 2014), include:

- Create a sense of urgency.
- Build a guiding coalition.
- Form a strategic vision and initiatives.
- Enlist a volunteer army.
- Enable action by removing barriers.
- Generate short-term wins.
- Sustain acceleration.
- Institute change.

These accelerators of change are outlined in the following subsections.

Create a sense of urgency

Success at this step requires those associated with the concept of the school to "buy in" both rationally and emotionally (Cohen, 2005; Kotter, 2014). A sense of urgency around a "*big opportunity*" enables behaviours to happen (Leavy, 2014). This is the first step to ensure that appropriate people act with sufficient urgency (Cohen, 2005; Kotter, 2014; Leavy, 2014). Everyone involved is encouraged to believe that the change is necessary before they are motivated to act (Cohen, 2005) since this is critical in maintaining cooperation and momentum of change (Cohen, 2005). People need to see the need for change so they can be emotionally charged to make the change happen. To gain support for the change, a rationale must be based on facts as well as on an understanding that the probable concerns of the current situation. To be compelling, two key elements must be present: the need for change, and an emotional connection to the problem for stakeholders. These two crucial effects act on people's emotions and generate the urgency required to start the change initiative. As people start to change their behaviour they see the rewards and opportunities (Kotter & Cohen, 2012).

Build a guiding coalition

A guiding coalition is formed from those who want to pursue the *big opportunity*, as "This group will have the drive, the intellectual and emotional commitment, the connections, the skills and the information to form the entrepreneurial core of the network"(Leavy, 2014, p. 9). With a sufficient sense of urgency, finding good people is easy and, with the right conditions and with a sense of urgency around the *big opportunity*, these people work together in a new way (Leavy, 2014). However, there are two types of people who ought to be avoided when putting the team together: those with "big egos and snakes" (Kotter, 2012, p. 62): people who create mistrust and will kill the team (Kotter, 1996).

Form a strategic vision and initiatives

The coalition clarifies a vision that best fits the *big opportunity* and serves to direct the dual operating system of management and strategic network. The right vision must be achievable and easy to communicate, appealing to the emotions of the group, enabling members to feel the need for change and become motivated. A vision must be strategically smart, provide the team with an image of success, and contain enough information and direction to make consequential decisions on the fly, without having to seek permission (Kotter, 2014). A vision needs to be supported by a strategy and shared with all stakeholders. Communication with stakeholders about the change initiative is essential to maintaining the momentum of the vision (Cohen, 2005).

Enlist a volunteer army

To enlist people, a leader needs to communicate a vision and create awareness of the *big opportunity*. By communicating with all stakeholders, people are attracted and empowered to create the change. A change leader within the organisation needs to use every means possible to constantly communicate the new vision together with strategies to support that vision (Cohen, 2005). Communication goes beyond special announcements and meetings to include frequent and informal face-to-face contact, thereby addressing any emotional dimension of people's fears and

concerns and attracting people to buy into the ambition of the message: beginning to share a commitment to it and reducing resistance to change (Kotter, 2014).

Enable action by removing barriers

It is important to identify and remove barriers quickly as these can slow or stop important activity (Kotter, 2014). Obstacles can include skills (or lack of), systems, structures, and individual's complacency or misguided opposition to change (Kotter, 2012). By removing barriers to change, others are empowered to act on the vision and encouraged to engage in risk-taking and innovative behaviours(Leavy, 2014).

Generate short-term wins

People respond well to being rewarded, especially when they do something new and desirable (Pryor et al., 2008). As change can take years, having defined milestones along the journey can make a difference. Short term wins should be celebrated and their relationship to the change noted (Kotter, 1996). The role of short term wins is (Kotter, 1996) to:

- Provide evidence of what the accomplished vision will be like as success breeds success.
- Reward those working on the change by building morale.
- Fine-tune the vision.
- Undermine cynics and self-serving resisters.
- Create visible results to retain support.

Sustain acceleration

Although by this stage, resistance should be diminishing, it is still important to observe actions (Pryor et. al., 2008), to monitor progress, and continue to convey drive. Kotter (2014) argued that many change initiatives fail when victory is declared too early because the change is not anchored in the culture.

Key change factors at this point include (Magnúsdóttir, 2018):

- Continue to establish the change.
- Bringing in additional people to help.
- Keeping the urgency up, led by senior management.
- Leading and managing people lower in the hierarchy.
- Eliminating interdependencies by managers.

Institute change

This step of the process is to make changes more permanent. A leader needs to demonstrate the relationship between new behaviours and successful organisational change (Kotter, 2014). The change becomes embedded in the culture of the organisation (Kotter and Cohen, 2002).

Leadership and Management in Schools

Leadership and management have a responsibility to ensure efficient operation, especially in new schools. Leadership sets the direction, organises and monitors, builds relationships within the school community, models values and practices that are consistent with those of the school (Berber, 2009). Management, by contrast, ensures that the systems within a school are working and running smoothly. These critical roles in schools make it necessary to consider the theoretical literature on both leadership and management.

The difference between leadership and management continues to be controversial within the literature (Lunenburg, 2013). Scholars argue that although management and leadership overlap, the two activities are not synonymous (Bass, 2010), while others claim it is the degree of overlap

that is contentious (Nguyen & Hansen Jens, 2016; Yukl & Mahsud, 2010). There is a disagreement over the activities and functions that leaders and managers perform (Lunenburg, 2013; Nguyen & Hansen Jens, 2016). Nyugen and Hansen (2016) contended that it is important to identify the conditions under which each role functions because each role requires a distinct mindset and set of skills. The challenge for individuals is the need to switch between the role of leader and manager (and vice versa). Kotter (1990) maintained that leadership and management are two distinct, yet complementary systems of action in organisations.

Kotter (2014) described the crucial responsibilities that leadership and management have. Leadership responsibilities consist of:

- Developing a vision for an organisation.
- Aligning people with the vision through communication.
- Motivating people to action through empowerment and basic need fulfilment.

Management responsibilities consist of:

- Planning and budgeting.
- Organising and staffing.
- Controlling and problem-solving.

If organisations are to succeed a blend of effective leadership and management is required (Vasilescu, 2018). As in most modern organisations the leadership structure functions across teams and workgroups, providing greater opportunity for more input from group members at all levels of the organisation (Ng'andu et al., 2018).

The function of both leaders and managers is to support and encourage the team, with the level of support required dependent on the individual team member. Team members need to have specific "abilities, skills, experience, attitudes, values, role perceptions, and personality" (Mickan & Rodger, 2000, p. 676). Each member of the group needs to "determine what they are willing and able to contribute, their level of motivation, methods of interaction with other group members and

degree of acceptance of group norms and the organisation's goals" (Mickan & Rodger, 2000, p. 676). Both leaders and managers need to be aware of the attitudes and attributes of each group member in order to offer appropriate support.

Decision-making

Within a school, decisions are made constantly. What needs to be considered in this thesis is a model or theory that surrounds these sorts of decision-making processes because the project being explored involved considerable decision-making. A decision-making process "is a set of actions and dynamic factors that begins with the identification of a stimulus for action and ends with a specific commitment to action" (Nutt & Wilson, 2010, p. 146). Table 2 includes a brief description of selected theoretical models of school decision-making to capture the diverse spectrum of approaches.

Table 2

Brief description of decision-making models used in schools

Theories and Models of Decision-making	Description
Social Judgment Theory (SJT)	Self-persuasion theory, defined as the perception and evaluation of an concept by comparing it with existing attitudes(Hovland & Sherif, 1980; Jager, 2017)
Cognitive Closure Model of Decision Satisfaction	Need for closure by individuals towards firm, definitive answers to questions, and seeking clarity. These individuals are more inclined to follow rules and accept authoritarian leaders, but less inclined to embrace diversity (Kruglanski & Webster, 1996)
“Muddling Through” or Echternach Theory	Decision-making approach in which groups “muddle through” the issues at hand based on importance. Change is largely evolutionary rather than revolutionary (Daly et al., 2013; Lindblom, 1979)
Garbage Can Model of organisational choice	Attempts to explain some organisational decision-making anomalies, in particular, decision-making by organisational anarchies where preferences are not clear (Cohen et al., 2011). Discovers, describes, and explains failures in organisations decision-making processes (Heitsch et al., 2000)
Rational Model of Decision Making	Multi-step process for making choices between alternatives. Favours logic, objectivity, and analysis over subjectivity and insight (Becker, 1976; Schwartz et al., 2011)

The Social Judgement Theory is useful when understanding and dealing with attitudinal factors and considering how attitudes can be changed. Social Judgement Theory utilises a framework to describe group judgments and decisions, interpersonal conflict, interpersonal learning, and learning uncertainty (Hovland & Sherif, 1980). Organisations that use this model must be aware that decision-making and the environment operate as a system together with sufficient information, to make decisions (Hammond & McCelland, 1980).

Cognitive Closure Model refers to the need for closure on a given topic, or the desire for a firm answer to a question (Kruglanski & Webster, 1996; Small & Venkatesh, 1995). The closure enables a group to reflect, summarise, and review, contributing to the confidence and satisfaction of the group. Studying the impact of closure considers the importance of individuals, as well as the group as a whole. This model provides a theoretical base that integrates motivation, information, and confidence (Small & Venkatesh, 1995), relying on information to be shared by members of the group.

The art of the "Muddling Through" method refers to small-scale or incremental improvements based on the important issue at hand. These improvements are undertaken without looking at the long-term effects on the organisation (Daly et al., 2013; Lindblom, 1979). This method is used within organisations to "stamp out fires" rather than considering long-term ramifications. Only small, incremental changes are noted in cases in which this method is applied. This theory privileges harmony within the group, allowing decisions on the fringe and thereby attempts to refrain from alienating individuals in the group (Lindblom, 1979, 2017).

The "Garbage Can" Model is considered a non-rational decision-making process (Kefford, 1994; Ocasio, 2012). According to Kefford, when a group makes a decision using this model, it will do so in three ways: oversight, flight, or resolution. Somewhat similar to "Muddling Through",

decision-makers who use this model adopt a standpoint of compliance, opting for a position that has the least resistance (Heitsch et al., 2000; Latimore, 2000).

The Rational Model of Decision Making describes a systematic analysis of facts in a step-by-step manner in order to make a decision (Becker, 1976; Schwartz et al., 2011). The goal is to choose the best solution and reduce the risk of errors. It is free of assumptions, hence reducing the risk of failure. This model takes considerable time and information to arrive at a decision. When a board follows the steps within this process, it is in the optimum position to make the best decision (Latimore, 2000).

In reviewing these potential models of decision making – with the benefit of hindsight – it would seem that the theory of muddling through applied to establishment of the school in this study. As the decisions made take into account the perspectives of people involved at the time, if an error is detected later, corrections can be easily made, as the changes are only small. Using an incremental approach is practical as it allows improvement at any stage.

Conclusion

The literature reviewed in this chapter has provide a theoretical basis to the process of generating and explicit retrospective understanding of the factors that were operating and influencing the establishment of a school for gifted students. In reporting the narrative of the establishment of the new school, the research of Collier (2001), Douglas (2012), and Nicholas (2008) are significant. Kotter's (1996) change management model is used as a guide in the reporting of a retrospective narrative and analysis of the schools' evolution from an idea to a functioning school. Kotter's (2016) expanded eight-stage model was used to design a conceptual framework for a retrospective analysis. The following chapter explains the research methodology in this study and includes an outline of the data collection and analysis processes.

Chapter 3. Methodology

Introduction

This chapter outlines the theoretical approach and research design adopted in this study. It will also describe the methods for generating and analysing data as well as the role of the researcher as an insider, and key ethical considerations. The chapter contains the following sections:

- Theoretical approach and design.
- Research methods.
- Data collection.
- Data analysis.
- Ethical limitations.

Theoretical Approach and Design

This study adopted a qualitative interpretivist paradigm to investigate and analyse the complexity of what occurred in the process of establishing a special interest school and the interplay of the core values and goals of a group when making key decisions in order to comply with government policies and regulations.

An interpretive approach to conducting research is characterised by a descriptive and analytical intent, rather than the actual research methods employed (Cohen et al., 2013). Interpretive research methods are observational, descriptive, and systematic (Cohen et al., 2013). Observations are subject to systematic analysis to describe “what is happening” in everyday life. Interpreting and analysing these observations occurs against a backdrop of people’s overall worldview and culture (Crotty, 1998). The intent of this interpretive research is to capture the interplay between individuals and social structures, and so an underlying social constructivist approach is employed to uncover “what is occurring”, rather than to intervene to change that which is occurring (Ritchie & Lewis, 2003).

Autoethnography

An autoethnography is a highly personal process because “the personal experiences of researchers themselves are the foundation of autoethnography” (Chang, 2013, p. 107). The autoethnographer is “first and foremost a communicator and a storyteller” (Ellis et al., 2011), cautiously examine how they interact with others and how this influences their own experiences, disclosing the “author’s personal, professional, relational and social-cultural identities” (Chang, 2013). Consequently, autoethnography is written from the researcher’s personal experiences, with the intention to expand the understanding of a social phenomenon. As stated by Chang (2013), the writing products produced in an autoethnography vary depending on the processes used and have the following characteristics:

1. The primary material or data utilised within the research are derived from the personal experiences of an autoethnographer as well as from documents, official records, interviews with others, and ongoing self-reflection and observational notes (Chang, 2013).

2. The positioning of autoethnographers enables them to easily access personal data that may be off-limits to other researchers and thereby make unique contributions to the understanding of experiences in the socio-cultural context (De Vries, 2012).

3. The encounters from an autoethnographic position happen within our memory, with people, and in a variety of places, allowing the autoethnographer to know “how and where they may locate the relevant data” (Chang, 2013) as they are uniquely familiar with the context.

4. A description of the data presents “what is”, leading to the development of the question, while the analysis is a systematic description of “how things work”, leading to an answer (Chang, 2013).

In adopting an autoethnographic approach, a researcher observes, reflects, and interacts within a subculture. In this instance, the subculture was a group of individuals who had an interest in starting a school. These personal and shared reflections provided insight into the establishment of the school and simultaneously allowed others involved to reflect upon and share their own experiences and changing understandings.

Because an autoethnography risks representing only one perspective, it must also incorporate other people's perspectives to allow the researcher to make meaning of other people's experiences (Chang, 2013). The data itself needs to be reviewed holistically to enable researchers to become acquainted with the greater body of data collected, taking note of recurring themes. Researchers should not impose categories or codes too soon to avoid losing sight of the meanings that have emerged. Chang (2013) advises to make meaning of the data is to view all of the data codes within a broader context and to understand how the data is connected to other people and existing research and to see the big picture, leading to connections for interpretation.

Participants and recruitment

The participants for this study were drawn from a population of twenty-seven board members who had been a member of the board from October 2013 to May 2017 of which I, the researcher was one. A purposive sample of five participants from the board membership was obtained to provide an opportunity for the researcher to gain diverse viewpoints of individuals' experiences during 2013 to 2017 period that is the focus of the study. The board participants, were representative of the following subgroups:

- Past members, who had been members of the initial Planning Board.
- Current members, who were involved with the initial 2016 board and the current 2017 board.
- New members of the board who joined when the school commenced.

These groupings captured potentially different perspectives. Two members were invited from each of the subgroups to participate in interviews, with five agreeing to participate.

Information on participants is outlined in Table 3 In this table participants are identified by a research participant (RP) number.

Table 3

Participant information

RP number	Parent	Occupation	Board	Group
1	Parent of gifted child	Lecturer	2016-current	New
2	No children	Teacher	2013-current	Original and current
3	Parent of gifted children	Teacher	2015-current	Current
4	Parent of gifted child	Teacher	2013-2016	Original
5	No children	Teacher	2013-current	Original and current

Researcher as an insider

While I am the researcher, I have also been a member of this school board, and now I am the principal of the school. Importantly, it must be noted that, to ensure that this research was ethical, the other members of the board were aware and supportive of my intention to conduct this research regarding the decision-making processes of the group. To that extent, they may well be considered co-researchers in the research process, contributing to the generation of productive understandings (Guldberg et al., 2021).

As the researcher, I am familiar with the "spatial dimensions of the research setting and its socio-cultural dynamics" (Whitehead, 2008, p. 3). In this study I am also an insider, who is not only the leader, but also a parent of a gifted child and an educator who is actively involved within the project. As an insider, I was in a unique position to study the project and its change processes, as I understood the complex situated issues at hand, as well the context, culture, and history of the group. The insider perspective enables a deeper level of understanding, as I had access to people and information, including knowledge of the complexity and tensions that occurred within the

group. As an insider, I am aware that I need to minimise the risk of coercion and acknowledge my own desire for a positive outcome, and thus ensure that tacit patterns are not being ignored.

My Master's degree in gifted education enabled me to reflect on the social and affective outcomes that are required for students with high intellectual potential. However, as an insider, I focused on what is possible for students, considering key elements involved in the establishment of a school in complying with regulations. It was also important to understand phases and record the history, as many of the founding members moved on.

Research Methods

Since I had occupied a critical role in the development of the school, I opted to use participant observation within an autoethnographic approach, as well as to engage in deep post hoc reflection with other key participants in the establishment process. These methods "[have] proven to be the best way to learn, in detail, about a diverse range of complex social phenomena from personal experience" (O'Reilly, 2012, p. 1).

Within the broad interpretive approach to this research, a range of research methods were employed, which were appropriate to the perspective and intent of this inquiry. The methods for data collection and analysis included: the maintenance and reflective analysis of an ongoing journal, document analysis, and rich picture interviews with key stakeholders to include the perspective of others and to make meaning of their experiences (Chang, 2013). (A timeline of data collection can be found in Appendix 5.)

Data Collection

Several methods were used to generate the data for analysis, including participant-observer, recording observations in a journal; document analysis (past minutes of meetings, regulatory policies and other government documentation); and rich picture interviews. These types of data collection, described in the following subsections, obtained rich descriptions and interpretations,

giving participants an opportunity to describe feelings, thoughts and experiences (Ayala & Koch, 2019). Data collection occurred from mid-2013 to the end of 2017.

In interpretive research data collection and data analysis are inseparable (Bogdan & Biklen, 2007). Adjustments to interview questions took place after each stage of the data collection/analysis process as new information was obtained. These adjustments were reflected in my journal, providing a rich and practical description of the project context, something that could be enhanced with insights from theoretical literature.

Journal

As an insider (Bruskin, 2019; Whitehead, 2005), I created and maintained a journal to record notes of meetings during the initial phase of the school development from 2013 to December 2017. As time progressed journal entries changed to become reflective in nature and detailed day-to-day interactions, meetings, telephone calls, and experiences. At the end of each day, I wrote a reflective summary as I found my thoughts to be clearer and not affected by the immediate circumstances. This assisted me to foster an ongoing conversation with myself about ongoing experiences (Raab, 2013) in establishing the school, in order to lay a historical foundation while it was remembered so that it would not be lost as the memory fades. This enabled me to gain an emic perspective of the social setting being studied (Bruskin, 2019; Whitehead, 2005). It was important that I identify and set aside personal assumptions and record only direct observations and quotes from conversations (Polgar & Thomas, 2020) as I participated in meetings.

The following quote is an example of a journal entry:

> 22 September 2015
>
> Board meeting tonight
>
> The non-government application has significant areas that we will need to complete. We already have our vision and goals; we need to also consider educational philosophy.
>
> Rex (pseudonym) had written a values statement yet there was very little agreeance from other members as to what was written. The board all had various ideas and no consensus

could be reached. I could see there were significant differences based on their own beliefs, as to what should be valued, yet I was unclear how to pull their ideas into a values statement that reflected the school. There was a long discussion about how to move this forward. It was decided to have Karen who ran these kinds of workshops. I need to determine if she was available.

We are still focused on obtaining a business manager, who has a financial background. We have a variety of people on the board, web designer, early child educator, high school deputy, policy guru. We need to think more about attracting some other people to help. (I also note that James was very quiet this evening).

I am finding it exhausting trying to join the dots or find the right people to ask the right questions. I seem to spend more time networking, than achieving what needs to be done at present.

Documents for analysis

Documents for analysis included notes, minutes from meetings, and policies considered to have an impact on the development of the school. By reviewing the interplay between these documents, it was hoped that an understanding would emerge through an articulation of the group values and the connections that exist between these and regulations and other government policies that are considered necessary to be incorporated in setting up a school. Government documents themselves were not analysed, but an understanding of how they interacted with the core intentions for establishing the school was considered important. Government documents included the *Australian Education Act 2014; Education Act SA, 1972*; *Educational Regulation, 2012*; *South Australian Gifted and Talented Children and Students policy*, 2016; Registration Board of SA application; and State and Federal Government guidelines.

Rich picture interviews

Visual representations have a long tradition in society, going back to cave paintings and hieroglyphics (Booton, 2018). To represent a situation, humans naturally create images to illustrate structural and process elements within an organisation (Bell and Morse, 2013). A rich picture is a cartoon that identifies stakeholders, their particular concerns and their understandings and interrelationships (Monk & Howard, 1998). Such pictures enable a researcher to ask deep questions about particular images, gaining an understanding of how people make decisions and interact with

various internal and external elements (Booton, 2018). I decided to undertake rich picture interviews to gain an understanding of participants' values regarding the goals of establishing the school.

While rich pictures enabled depiction of obvious elements, they also enabled clarification by each participant of specific experiences and gave a clearer insight and universal understanding of the situation (Brydon-Miller & Coghlan, 2014). Rich pictures carry spatial clues and emotions that may hint at hidden thoughts and relationships that may never emerge in verbal discussion, therefore combing visual and verbal data could help to enhance validity when answering the research question (Booton, 2018).

I undertook a pilot interview to determine the value of the technique and to evaluate the process and the initial question used. I sought feedback from the participants after the interview to gauge their level of understanding and asked them to comment on what might need to be altered. This pilot interview ensured there was sufficient time given for the participant to draw their rich pictures (20 minutes), as well as a period of time to describe their illustrations (Kazi, 2005) and to engage in a conversation with the researcher to explain the drawings (30 minutes). Small adjustments were made to include an example of a rich picture, and different coloured pens to be used to draw images. The question used at the onset of the interview provided the scope for the drawing to be undertaken. I found that I needed to ask more detailed questions about some of the images in order to gain a greater depth as to the illustration to gain a sense of how they perceived the issues in designing the school.

Rich picture interviews were conducted between September and November 2017. Most of the interviews were conducted in various locations of the participant's choosing, to ensure he or she was comfortable with the surroundings. All interviews were audio taped, and these were later

transcribed. To maintain anonymity, participants are referred to by pseudonyms and a number allocated to each one based on the order of interview.

At the start of their rich picture interview, participants were given tools and were asked “to illustrate their understanding of the group’s values and intentions in starting a school for gifted children as well as what was required to establish the school”. They were asked to include indications of perceived enabling circumstances and constraints to the process they had experienced while on the board. Each participant was given 20 minutes (on their own) in which to produce a drawing about their perception (included in Appendix 2). On returning to the participant, I asked each one to explain his or her drawing. I would also ask questions about particular images as an entry point for engaging in unstructured interviews.

Data Analysis

Data were subjected to thematic analysis to generate patterns, meanings, themes, concepts, and connections (Denzin & Lincoln, 2018). The analysis generated knowledge derived from a retrospective analysis and hindsight to record the information in a systematic way to provide a sequential model.

This section details the following phases of data analysis:

- Journal reflections and observations.
- Document analysis.
- Rich picture interviews.
- Retrospective analysis.

In addition, the section describes the important role of the “critical friend”.

Journal reflections and observations

Phase 1 of data analysis drew upon journal reflections and observations. This involved identifying keywords or phrases and comparing similarities and differences between those categories until specific patterns became evident (Bogdan & Biklen, 2007) forming specific codes. All journal entries were typed, highlighting any keywords or phrases, and given a code. The code was descriptive and represented a symbolic assignment of a word to capture a phrase or word. An example of entry and coding is included in Table 4.

Table 4

Journal entry with highlighted phrases and codes

Journal entry	Coding
The non-government application which has significant areas that we will need to complete. We already have our vision and goals; we need to also consider educational philosophy.	APPLICATION PHILOSOPHY
Rex had written a values statement yet there was very little agreeance of what was written. The board all add difference on what was said and written. I could see there were significant difference based on their own beliefs, as to what should be valued, yet I was unclear how to pull this into school values. There was a long discussion about how to move this forward. It was decided to have Karen who ran these kinds of workshops to determine if she was available.	VALUES DIFFERENCES EXPERT
We are still focused on obtaining a business manager, who has a financial background. We have a variety of people on the board, web designer, early child educator, high school deputy, policy guru. We need to think more about attracting some other people to help. (I also note that James was very quiet this evening).	MEMBERS
I am finding it exhausting try to join the dots or find the right people to ask the right questions. I seem to spend more time networking, than achieving what needs to be done at present.	EXHAUSTION

Document analysis

Phase 2 included analysis of documents by looking at minutes, newsletters, emails, and application forms. The document analysis occurred from January 2015 to December 2016. To best understand the trends and patterns over time, a timeline of meetings and events were kept in chronological order along with a summary. The same process of highlighting key phrases (as Phase

1) was employed to determine codes. A-priori codes generated from the journal were cross-referred to the documents within the timeline, looking for patterns to validated codes already found, and identified new codes as they emerged. An example is contained in Table 5.

Table 5

Example of cross-referencing and validating codes

Meeting	Now have a friend of Dara Group-16 members	
	Opening a bank account	MONEY
	Budget outline for school started, need to consider:	MONEY
	• School fees need to be comparative yet available to lower socio-economic groups-idea of a volunteer working for reduced fees.	MONEY
	• If we want to have the best teachers in the state, we need to have some of the most comparative rates.	TEACHER MONEY
	• The need for scholarships	
	• Charity status	MONEY
	Formulating ideas for the new website-goals and philosophy	COMMUNICATION
	Using Facebook ™ as a communication tool	COMMUNICATION
	Draft business plan-working document at present	
	Start to work on policies, as they will be needed in the future	POLICY

Codes were then grouped by similarity. A cross-comparison of journal codes and document codes revealed similar patterns. A constant comparative analysis method was employed as an iterative and inductive process of reducing the data through constant recoding (Carey, 2021), and specific themes started to emerge.

Rich picture interviews

Phase 3 of data analysis was derived from the rich picture interviews. The interviews had been transcribed and returned member checking (Candela, 2019) for validation to ensure accuracy; participants added changes if needed before returning.

I read each transcript, highlighted key phrases, and codes assigned on the right of each page. Interviews were reviewed over several rounds to gain an appreciative understanding of the content. Constant comparisons of the codes generated were made, noting similarities and differences (Creswell & Poth, 2018). All transcripts, notes and journals were re-read to determine what connected the researcher (self) with participants (others) (Raab, 2013) and how these stories have affected the outlook of the researcher.

This stage of the analysis involved triangulation of all data sets to check for specific themes across all data sources. On cross checking specific themes emerged, as outlined in Table 6.

Table 6

Codes and Themes that emerged

Code	Theme
PURPOSE	Reason we started the school
VISION	Clearly identified vision
VALUES	The emotional investment of a person
PROMOTION OF THE SCHOOL	To be accepted by the wider community
COMMUNICATION	
GIFTEDNESS	All members needed to agree and be built into the school structures
SELECTION PROCESS	Criteria for attending
IDENTIFICATION	
LEARNING NEEDS	Gifted children have specific support
CURRICULUM	Expertise in Australian curriculum
GOVERNANCE/BOARD	Governance structure design
LEADERSHIP	Effective leadership and management
TEACHERS	Appropriate teachers to educate the gifted child
	Teachers aware of the appropriate practices
REGULATIONS/COMPLIANCE	Regulations and compliance required intense navigation
LOCATION	Locating a site was difficult
FINANCIAL VIABILITY/MONEY	To be self-sustaining the school must have capital

Retrospective analysis

Phase 4 was derived from a retrospective analysis. The number of longitudinal data sets generated covered a four-year period. Accounting for this process required a historical or retrospective explanation, "one that provides a trustworthy account of the process whereby a series of events each of which is local and contingent-can be seen as part of an emergent and potentially reproducible pattern" (Cobb et al., 2003, p. 12). According to (Cobb et al., 2003), a primary focus when undertaking a retrospective analysis is to place the design in a broader theoretical framework that accounts for these effects and thereby making it possible to anticipate outcomes.

After conducting the interviews, reviewing documents, reflecting on my journal entries, and coding the data, I appreciated that the steps taken during the stages of development of the school

resembled Kotter's (1996) model of change. This realisation, along with ad hoc analysis and reflection provided a conceptual framework that provided a model to present the findings using an autoethnographic approach from the time the idea was conceived to the time the doors opened. (See Table 7 in Chapter 4).

Critical friend

One research tool employed in this research was that of a critical friend, "who walks beside and assists the researcher in both the personal and professional stance" (Appleton, 2011, p. 1). I was mindful of my position within the group as an insider and chose to enlist the support of a critical friend. The person I chose had been a principal of an Ignite high school in South Australia, and had an interest in gifted education, leadership, and management. This person had also undertaken research and had published many papers. We would meet in each other's office, initially each month, or I would email questions and parts of my research design. My critical friend would ask provocative questions on the conclusions I had drawn in order to challenge the inferences I had made. My critical friend had a less biased pair of eyes and would ask clarifying questions to make me think deeper and look for the lived experiences.

Ethical Considerations

This project was approved by the Social and Behavioural Research Ethics Committee (SBREC) at Flinders University (see Appendix 1). Careful consideration was given to ethical protocols before, during, and after the research process.

In using personal experiences as an autoethnography, it is a reminder that we do not live in isolation and are connected by a variety of social networks (Adams, 2006) through which we form relational ties. Subsequently, when undertaking research, we implicate others who may be identifiable to the reader's ethical dimensions of the inquiry, and this must be considered at the forefront within the research. Within this research, the auto-ethnographer is obliged to show their

work to participants interviewed and implicated in the findings, allowed them to respond. Corrections were made to the text as a consequence, as it is important to protect those implicated to maintain integrity (Ellis, 2007; Owen et al., 2009).

Informed consent

Informed consent was required of all participants. A letter and consent forms outlined the following:

- Confidentiality and privacy.
- Right to withdraw at any time.
- Secure storage of data on an encrypted computer and hard drive.
- Use of pseudonyms in data storage.
- Purpose of the study.

In terms of informed consent, all participants involved were over the age of 21. The group was formed in the first instance in a voluntary capacity and in support of this research. They were already fully aware of the project proposed and perceive it to be an aid to their own deliberations and intentions. That said, all efforts were made to ensure individuals were aware that participation remained voluntary so that individuals would not feel coerced into participating.

A communicative culture had already been established in the group, such that, when concerns arose, the group dealt with the issues in a confidential and honest manner. A transparent approach was adopted throughout the study to maintain the confidence of all participants. An additional safeguard was the use of an external critical friend, who offered a reference point to ensure that concerns of individuals were not overlooked. Once ethics approval was granted by the university (Appendix 1), a personal letter was sent to the school board requesting formal approval to commence the research.

On completion of the interview, an opportunity was given for each participant to ask questions. In addition, the researcher used a special email address specifically for the research to

enable participants to ask clarifying questions, or to provide feedback on their contribution to the findings of the research.

Confidentiality and anonymity

All data is currently stored electronically on a hard drive that can only be accessed with a password. When the hard drive was not in use, it was stored in a locked filing cabinet in the researcher's office. All notes were recorded in the electronic database and handwritten notes and journals are also securely stored in a locked filing cabinet. Passwords for all data and records are only available to the researcher. No identifying information, such as names, were or will be used in presentations or subsequent publications and pseudonymous are used rather than real names, although it is possible that people within the group may know who participated. All information pertaining to individuals, however, remains confidential. The list of names linked to pseudonyms were destroyed by the end of the study. When the thesis has been completed, a final, electronic copy will be sent to the school board.

Summary

The methodology for this research study adopted an interpretive approach. By using auto-ethnography I was able to construct an understanding of my experience of establishing an independent special focus school and compare it with that of selected co-participants in. As the sample size was small, I was aware of the ethical issues and took precautions and employed procedures to ensure the anonymity and confidentiality of those who participated. This mindfulness of diverse interests and needs was aided by the inclusion of the use of a critical friend who could challenge my tacit and taken for granted assumptions embedded in my analysis.

The following chapter provides the findings derived from my analysis of my journal, selected documents and rich picture interviews. To represent an overall picture clearly, the major themes were viewed from a focus on the collective rather than on individuals. Thus, the actions of

individuals are not highlighted in the analysis, rather, the focus is on the processes employed by the group to arrive at important outcomes, as well as my reflection of the lessons learned.

Chapter 4. Findings

Introduction

This chapter reports the findings of a retrospective study of the experiences of those involved in the development of a school for gifted children: from original conception of the project to the establishment of a functioning school.

The chapter aims to answer the major research question of this study (Chapter 1), namely:

> What is the interplay over time between a special interest group's values and aspirations and their compliance with required government regulation to achieve the outcome of establishing a school for gifted children?

Framework used to guide analysis

The findings from the data collected from the rich picture interviews, journal entries and minutes from meetings, and the process of conducting a data analysis aligned with Kotter's (1996) eight-step change model (See Table 7). The model provided a framework to report the narrative of each of the themes, following a timeline of the establishment of the school from concept to creation. At the end of each of these thematic narratives, there will be a review of the decisions made, actions taken and tension resolutions, as reflected in theory examined in the literature review.

Table 7

Derived themes

Stage	Timeline	Code	Theme	Kotter Model
Foundation	**2013**			Creating the climate
		Purpose	Gaining support for establishing the school	Create urgency
		Members	Coming together as a group	Form a coalition
		Vision	Developing a clear vision	Create a vision
Development	2014 -16			Engaging and enabling
		Promotion of the school	Communicating and sharing the vision	Communicate the vision
		Communication		
		Governance	Empowering members to develop a governance framework	Empower action
		Values Staff Define gifted	Creating a school structure and processes	Create quick wins
		Selection Learning needs Curriculum Leadership		
Establishing	2016			Implementation and sustaining
		Compliance	Compliance for registration	Build on the change
		Location	Finding a location	
Operational (Doors open)	2017			Implementation and sustaining
		Financial	Financial viability	Make it stick

Conventions used in this section

Within the narrative, quotes and other data used have been assigned references according to the source of the information – namely, minutes (M), reflective journal (J), newsletter (N), and letter (L) – followed by a date. Those interviewed are referred to as research participants (RP), followed by a number to indicate the person interviewed and the page number in the transcript. Pseudonyms have also been used to protect the identity of those interviewed. This approach

enables the narrative to flow while identifying the data source, as well as allowing an audit trail for credibility.

The stages of a school's development, as outlined table 7, are described in the following sections:

- Founding a school.
- Developing a school.
- Establishing a school.
- Operating a school.

Founding a School

The founding phase of a new school includes the period from the conception of an initial idea to the development of detailed plans for establishing a school.

Organisations are established from an idea or concept, which at times are reviewed and adjusted due to a need for change to create a solution for a perceived problem (National Research Council, 1997). Creating the climate for change, according to Kotter (2012), needs more than effort and commitment from the initiators; it requires action. Motivation to act relies on those involved believing that change is critical (Cohen, 2005). Popovic and Plank (2016) emphasise that, as educators, we are the catalysts for change and, as we enter the process of creating the need for change, it is important to ask: for what purpose? Where is the change coming from and what is motivating the change? (p. 208).

In this instance, a diverse group of individuals responded to a series of highly frustrating personal experiences concerning the education of gifted students, such as a perceived demand among families for an alternative option. The group formation was motivated by a shared concern for the quality of education for gifted children and a shared presumption that the most effective response to these frustrations would be to establish a new school. By the time the group formed, the members had already established a common understanding about the problem and its solution

and had become inspired to act. To establish a school, there needed to be a level of support, a guiding alliance, and a vision as the school developed through the different phases to become established.

There are three themes (Table 7) in this first stage:

- Gaining support for the establishment of a new school.
- Coming together as a group.
- Developing a clear vision.

There was also a need to identify what regulations governed the establishment of an independent school and required compliance.

Gaining support for establishment of a new school

According to Kotter (2012), creating urgency and gaining support requires a case for change that has a sound basis for confronting the problem at hand and heightens awareness of the issues. According to Cohen, this "means gaining converts through both logic and emotions" (Cohen, 2005, p. 21).

In this study, the concept for a school was generated from an idea raised in an informal discussion in a school staff room regarding a shared sense of disappointment at a perceived failure to understand and provide for the needs of gifted children within the current school. A colleague mentioned that she "had an idea to start a school for gifted children" and went on to state, "It is easy, you get the funding from the government" (Journal, 14/5/2013). The idea of starting a school took hold. To determine whether there was indeed a need for a new school, over the next few months the proposal to establish a school solely for gifted students was discussed informally with other people in the community, such as friends, colleagues, and parents of gifted children looking for support. During these conversations, people commonly expressed a belief that gifted children's needs were not being met within mainstream settings. They identified perceived gaps in the

educational provisions for gifted children as well as nominating their preferred solution: namely, to establish a school with a specific focus on gifted education.

In the research interviews, Anita reflected that, in that initial phase, all members shared a common motivation, "We all wanted the best for gifted kids and were finding that schools were not catering to them … so (we) felt that we needed to start a school that catered to gifted kids" (RP4, p. 1). In reflecting on the initial motivation, Nigel observed that the mainstream system was focused on "lifting achievement levels of the bottom end of students" (RP2, p. 1) and believed that it was "done … almost to the exclusion of the top end" (RP2, p. 1). He identified that, from his own experience as a teacher, if you focus on the bottom end of the class, "you bore the brains out of the kids at the top, and you're actually holding them back" (RP2, p. 1). This sentiment was shared by many of those interviewed. They often made the comment that our "current system is unbalanced" (RP2, p. 2) and does not support gifted children.

Martin expressed a similar viewpoint from the point of view of social change. He thought that "the establishment of a special focus school dedicated to gifted children was an inevitable solution to the problem" (RP5, p. 4). Furthermore, Martin said there was a growing movement within the community that required a change in the ways schools educate the gifted child, and that "this school was going to happen one way or another" (RP5, p. 5).

Reflection

The group began with a shared belief that the current education system was "unbalanced", and that gifted education was not being addressed. Collectively, they perceived only one solution, which was to start a specialist school for students with high intellectual potential. I had a degree of personal involvement in starting the school, even though it was not my idea. In doing so, I made a personal commitment to bring the idea to fruition and engaged in dialogue with the wider community about the need for change, as well as discussing the probable consequences if the current situation is allowed to persist (Cohen, 2005). In reference to Kotter's first step, members who joined the group were gained through both a rational and an emotional buy-in; as a result, these two crucial elements combined to generate a sense of urgency to confront the apparent problem (Cohen, 2005; Kotter,

2012). In creating this sense of urgency, individuals joined together to question and validate (Cohen, 2005) the idea for themselves regarding why the change was needed and, in doing so, gain cooperation and sustain the momentum (Kotter & Cohen, 2012). Without this shared sense of urgency amongst the team, "the momentum for change will probably die far short of the finish line" (Kotter, 1996, p. 36).

In hindsight, I realised that I had tacitly taken on a leadership role. Kotter and Cohen (2012) described a leader as someone who takes ownership of the issue, communicates a compelling story, and engages with others about the change needed. It is important to note that, during this initial period, there was no mention of the state and federal legislative requirements related to forming a school, nor was there any discussion about the knowledge, skills, and effort that would be required of members of the group.

Coming together as a group

The establishment of a school takes more than one individual: "Significant change needs a number of people who can actively champion and take the necessary action when the effort comes up against barriers" (Cohen, 2005, p. 35). Creating a team "requires three critical elements: engaging the right people, setting clear goals, and developing a climate of trust" (Cohen, 2005, p. 36). To come together and form a group, we needed to find other like-minded individuals who shared the same common interest and engage people who were committed to the task at hand.

The initial group of ten people was largely comprised of parents who desired an education that supported children of high intellectual potential, or "gifted children". Three were teachers, another was a university student studying education, and another was an early childhood worker. Others included a stay-at-home mother, a policy writer, a lawyer, a church minister, and a tradesman. The minutes from the first official meeting (M, 8/10/2013) recorded questions raised by members of the initial committee. Some questions were very basic and practical, while others required far deeper consideration (M, 8/10/2013):

- What will the school be called?
- What are the vision and educational philosophy?

- What specific roles within the committee are needed and who will do them?
- Will the school be co-educational, non-denominational, community-oriented?
- What would be the entry requirements for students?
- What year levels would the school start with?
- What would be the school structure?
- What is the process for applying for registration?
- What funding is available and how can it be accessed?
- What will be the curriculum?
- Should we lease or buy a site?

As a group, we held little understanding of what was required to establish a school. The initial challenges the group faced included: not knowing what a starting point might be, where to obtain guidance for setting up a school, and what the requirements were (J, 8/10/2013). Nevertheless, there was considerable discussion regarding what we could do. From the outset, a decision was made regarding who this school would serve. This school is "for students that just don't fit in, quirky kids, profoundly gifted, twice-exceptional" (M, 8/3/2014). The members also decided to articulate a clear purpose for the school. Throughout the next few meetings, the group generated a vision for the school to "provide an environment where everyone is given the opportunity to achieve their potential" (M, 3/12/2013).

All members understood that, to establish the school, a significant amount of planning and initiative was required. An important feature of these initial meetings was the participants' enthusiasm to achieve the agreed objective to establish a school. It is important to note that the objective to establish a new school primarily for gifted children was never really questioned by the group and neither were other alternatives explored. There was a strong shared conviction and level of personal investment, among the group, that a new school was needed to provide opportunities for these students to attain their full potential.

In her interview, Wilma recalled that the people who joined the committee were passionate and highly motivated to meet the unique educational needs of gifted children. She stated: "many of

us felt the needs of gifted students [were] not being met at school. This passion was based on a deep understanding of the [theory], the research, and the professional practice base [required]". (RP3, p. 1)

Finding the essential information on how to start a school, however, was a challenge. Contact was made with the Association of Independent Schools of South Australia (AISSA) to identify what was needed. We were advised of the following requirements:

- A two-year business plan.
- The posting of a public message regarding our intention.

We were also advised that no grants were available to help start a school and that achievement of registration was through compliance with the Education and Early Childhood Services Registration and Standards Board of South Australia (EECSRSB) (J, 17/10/2020) (M, 5/11/2020).

Based on this advice, the Education and Early Childhood Services Registration and Standards Board of South Australia was contacted. The registrar for non-government schools advised the following (J, 20/10/2020):

- Notice of intent needs to be completed first; this occurs in April each year.
- Application for registration of a new school is available on the website.
- Formation of a Body Incorporated was required.
- State funding could be obtained in an application to the Office of Non-Government Schools and Services.

This information was presented at a planning meeting (M, 5/11/2013) and provided the group with starting points and guidance on what needed to be accomplished and in what order.

An important element of coming together as a group was the establishment of particular roles. The issue of establishing a group structure, as well as leadership and other roles, emerged as a necessary element to maintain and develop the shared objective among new members and to

coordinate and drive the process through what was regarded as a "minefield" (RP3, p. 4) for achieving compliance. Whilst the issue of leadership and organisational structure was not the focus of discussion, these issues were raised in the reflective process during interviews. Members recognised that establishing a leader and an organisational structure was part of an evolving school, as well as systems for decision-making and communication.

Records of our initial meetings report that, based on our experience, we understood that schools had boards, constitutions, staff, strategic plans, and curriculum. Until now we had been unsure of which requirements must be addressed first. In the first instance, we decided that we would remain a steering committee and that specific roles and responsibilities needed to be assigned:

- Chairperson – planning meetings and building and leading the team.
- Secretary – setting the agenda, taking minutes, correspondence.
- Treasurer – financial oversight, banking, bookkeeping.
- Marketing – fundraising, communicating the message to the community.

I was nominated as the chairperson of the steering committee. Wilma argued that "you have to have one focussed person… who leads from the front" (RP3, p. 3). A leader needs to "provide direction to obtain the endpoint … in this instance, the registration of a school for gifted children" (RP2, 6). Nigel envisaged the responsibility of the chair would be to "wade their way up through a jungle of compliance, regulations, and barriers" (RP2, p.6) and "climb towards the vision if we are to succeed" (RP2, p.6). Wilma framed her sentiments slightly differently and believed that a group was inspired by its leader's vision (RP3, p.12), which would assist them to work towards a common goal and achieve a shared purpose.

The minutes reflect that I accepted this leadership role and drafted a twelve-month timeline (M, 3/12/13), establishing milestones to be actioned along the way. The timeline provided the needed structure, priorities, and the relevance for what needed to be completed and when. There

was no handbook available to explain what was needed and guide us. It is important to note that at this early stage I did not consider or elect to read up on any scholarly or professional literature on leadership or to reflect on possible alternative approaches I might take in my role. My leadership was pragmatic, focused on what was to be done to establish the school and on managing the needs and cooperative engagement of the founding group members.

Berber (2009) asserts that leadership is necessary for any organisation and describes the role as the one who sets the direction, organises, and monitors the school. As the leader, I was expected to determine and communicate what was relevant, breaking the information and major tasks down into "smaller steps"(Bendor, 1995), so that it could be perceived as feasible for the volunteers on the steering committee to engage with the plan and processes. In this leadership role, I had "a vision of what can be achieved" (Wajdi, 2017, p. 75) and what strategies were involved to realise the vision, as people need to be motivated to achieve their shared goals (Wajdi, 2017). Kotter (2018) maintains that to capitalise on the momentum during this stage, leadership is of paramount importance and is obliged to focus on fostering a vision upon which to base action, innovation, and celebration, as well as essentially managing the process.

All members were eager to participate and were willing listeners to other opinions during the early stages of development. Whilst there was a shared goal focused on a shared problem, there was also diversity in the personally held values within the group. The effectiveness of any group and its ability to achieve goals is enhanced or hindered by the internal relationships (Cohen, 2005). There were some issues. At times, members of the group adopted a stance of mere compliance to the espoused common goals as they realised that some of the "goals were not as pure and simple as wanting to do their best for gifted students" (RP3, p. 4) and consequently their initial energy and excitement waned. It also appeared that some people had a vested interest for personal gains. As Martin (RP4, p. 3) reflected during interview, some members of the group appeared to be investing

time in the group in order to secure their opportunity to obtain a position in the new school. RP5 reflected that "working with people can be unpredictable" and we should have been "more scrupulous about vetting individual members and what they could have brought to the school" (RP5, p. 6). At times, the interplay between members thwarted the process of achieving objectives and wasted time needed to progress the gaining of registration to allow the establishment of the new school.

Reflection

The committee was enthusiastic from the outset. They asked questions, defined roles, and took on responsibilities. However, during the retrospective interviews, it was brought to my attention that we had some team members who may have been there for alternative reasons, such that their participation failed to contribute to the development of the school. As I reflected on the interviewee comments, I recalled that I had also pondered at times why certain people remained on the committee. The beliefs expressed by those interviewed were based on their experiences within the committee and were influenced by their own individual capabilities, personalities, and teamwork behaviours (Tannenbaum & Salas, 2020). Kotter (2012) also identified that people with big egos (full of their own self-importance) and snakes (people who cause mistrust) must be avoided when assembling a team. Levi and Askay (2020) similarly highlighted that problems can arise from people with hidden agendas, which are unspoken individual goals that conflict with the group. These individuals become "a barrier that the rest of the team must overcome, and these detractors dealt with carefully to avoid resentment, as well as a decline in productivity"(Cohen, 2005, p. 47).

In retrospect, I have learned a valuable lesson that building a team with many people does not ensure an effective team. All members must be effective if the team is to demonstrate sustained performance, team resilience, and ongoing vitality (Tannenbaum & Salas, 2020). For future reference to prevent problematic interactions, I would now undertake two activities in establishing a team. Firstly, I would evaluate all potential contributors against a carefully designed set of criteria (Kotter & Cohen, 2012, p. 38), and use this to select suitable group participants who would possess a diverse set of knowledge, skills and experience. Secondly, I would use diagnostic self-assessment and peer review tools in an on-going way to gauge the team's effectiveness as a working group. It may transpire that some people will need to transition out of the team, to be replaced by more productive and collaborative members (Kotter, 2012).

Developing a clear vision

An effective vision is one that supports the need for a change, is clear and is easily understood (Kotter, 2012): “The vision must appeal to people’s emotions so they can see and feel the need for change and are motivated to be part of it” (Cohen, 2005, p. 71). Kotter (2012) also recommends that the vision should provide a picture for success with enough information and direction to make important decisions “on the fly”.

During the preliminary stages of planning for the school, members of the planning committee identified the need for an explicit, shared vision that, once agreed upon, would guide the development of the school, give hope to individuals, and inspire enthusiasm. The committee reasoned that a clear vision would capture and clarify the essence of what the school would become in the future. The process of bringing the vision to the forefront provoked members of the group to develop a shared understanding of what they were aiming for.

The shared vision that was developed in the first few months later provided helpful guidance in generating a preferred educational model for the future of the organisation. This was conveyed by Nigel, who proposed a belief that “having a really well-founded, well-constructed very powerful symbolic vision that is grounded in educational philosophy is essential” (RP2, p12). The planning committee’s early discussion now reflected Nigel’s idea: the vision aimed to allow children “to explore their creativity and their best potential… At the same time, it [was] very important that [the vision was] about those people becoming constructive members of the future community” (RP2, p.4).

During the first few meetings, there was considerable discussion on the vision, mission, and goals we wished to include, as well as an exploration of their implications. The vision is future oriented to express the intent of the project, whereas the mission and the goals are strategic, outlining a pathway to achieve the vision. The mission focused on members’ perceptions of specific

educational and psycho-social requirements for gifted students and important principles that must be considered in school design. Several important principles that were shared by the group during meetings were reflected in my journal (J, 17/11/2020). These principles included:

- Provide a challenging curriculum.
- Provide an environment for personal growth and social and emotional wellbeing.
- Employ teachers who are experts in the field of gifted education.
- Generate individualised educational plans for students.

The group adopted a collaborative approach to translate the principles into practice, and this applied philosophy provided a foundation for the clarification of the vision, mission and goals (M, 8/11/2013). These foundational ideas were captured in a framework that developed incrementally, evolving in specificity as the organisation formed. Table 8 contains an example of ideas captured during early meetings (M, 11/12/2013).

Table 8

Ideas captured during an early meeting

Vision
To ensure that gifted children have a fun and challenging environment in which to grow and learn.
Mission Statement
The school provides a caring environment where the affective needs of gifted students are catered for, curiosity nurtured, and students are encouraged to grow in maturity and self-esteem. We believe this provides gifted students with the opportunity to excel academically, and with the skills to become independent lifelong learners.
Our Goals
To provide a flexible, balanced, and relevant curriculum that: • Challenges students according to their ability. • Prepares students for lifelong learning. • Offers opportunities for personal growth and development. To provide cooperation that: • Respects and values the teacher and encourages professional growth. • Fosters communication between home and school. To provide an environment where students' academic needs are catered for and achievements are celebrated. To recruit the most talented and qualified staff and support them in their work. To provide an educational culture where all levels of giftedness are acknowledged and appreciated. To provide opportunities for advancement and acceleration of students where appropriate. To formulate an individual education plan for all students with appropriate strategies for each student.

While it is quite possible that this vision and mission and goals might also apply to any school, it is important to note that the starting point for this school was to recognise the diversity, uniqueness and challenges of the needs of gifted children. We aimed to design and provide a specific style of education that supported these goals, and which differed from mainstream schools.

We were motivated by our ideals, which reflected what we, as a planning group, hoped to achieve in the future. Our first vision statement was "To ensure that gifted children have a safe, fun, and challenging environment to grow and learn" (J, 8/12/2013). This statement was altered later in 2015, as three important pieces of information presented to the committee prompted further discussion and refinement of the vision. Firstly, in reviewing all possible sites for a school, it was

noted that “we present our vision of the school in the way we want to use the space” (M, 26/5/2015), and secondly, the information provided by the registrar of Non-Government schools stated it is “important that all the policies and procedures regarding the standards of instructions, including ‘big picture’ school philosophy need to be made clear within the vision” (M, 11/8/2015). Finally, “it was important to ‘pitch’ why our school model is better for gifted students, as well as why our school would not work best following a more traditional model with a ‘bolt-on’ gifted program, similar to some of the existing programs” (M, 11/8/2015). The group made the following decision to “restate our vision, as well as outline the need for learning space… the things we have learned from our meeting so far – in dot point form… sharpen into a formal document” (M, 11/8/2015). This formal document that had been created became known as *The Working Document*. The committee agreed that one member must take ownership and present an improved vision and mission statement. The revised vision stated that the goal was “To ensure that gifted children have a challenging and meaningful educational environment that optimises their learning” and this was formally accepted by all members of the committee (M, 15/9/2015). Kotter (2014) recommends that a fact-based analysis is undertaken to ensure the vision is built on a solid foundation and is based on benchmarking to understand best practices to measure success.

The goals that were embedded in the intended mission statement evolved as the plans for the school developed. There was an incremental evolution of the mission statement. The following statement was written by the team:

> Our aim is to nurture and support students’ affective development while inspiring our students to become innovative thinkers and expert communicators, in readiness for participation in the increasingly relevant global community. Our focus on creating a strong relationship between the educator and the student allows us to build a challenging, meaningful, and engaging curriculum at each child’s individual readiness level.

Reflection

On reflection, the group had designed a vision that was adjusted through an on-going consensus process. The process the group had undertaken was in line with Kotter’s (2014) six key characteristics of an effective vision: imaginable, desirable, feasible, focused, flexible, and easy to communicate. In

retrospect it is my belief that the espoused vision fulfilled all these characteristics. The group found that establishing the vision during the early (foundation) phase was important because it provided direction and purpose for all subsequent plans (Kotter & Cohen, 2012). The vision forms the basis for decision making, motivates people to take action, and coordinates the actions in a fast and efficient manner (Kotter, 2014). Creating a vision is a critical stage in school development, as the school vision includes the desired image, as well as basic assumptions regarding the educational building blocks (Tubin, 2008).

In retrospect, I would encourage others to develop the vision first, because of its capacity to motivate and inspire people into action. Furthermore, Tubin (2008) also recommends the vision forms the origin of the project that [motivates] the complete establishment process and helps to guide the initial phase of the school, while the mission provides the approaches to achieve the vision.

On reflection, it is clear that, in this phase, the government regulations for establishing a school had little impact on the values, thinking and actions of the group. Notably, despite wanting to engage in developing a vision statement for the school, at this stage the planning committee was not aware that such a statement was required for the application for registration of a new school with the Education and Early Childhood Services Registration and Standards Board of South Australia.

Developing a School

The next phase in Kotter's model (2012) is about engaging and enabling the organisation in a change process. According to Kotter's model, there are three specific stages in this phase that require communicating the vision beyond the planning group: empowering others to act on the vision, and planning for and creating short-term wins (Hiyari, 2020). Building community capacity and awareness of the school required the committee to decide on the most effective and feasible way to share information, as well as developing governance and school structures. The three themes in this stage are:

- Communicating and sharing a vision.
- Empowering people to develop a governance framework.
- Creating a school structure.

Communicating and sharing a vision

A good vision offers a compelling, motivating picture of the future (Cohen, 2005). Effectively communicating a vision "is the key to capturing commitment" (Cohen, 2005, p. 90) from all stakeholders and creating a "unified goal and understanding of the school's purpose" (RP1, p. 8) for the future.

To be of value, a vision had to be communicated intentionally to build awareness and inform the community of the alternative educational opportunity a new school would provide. Communication of the vision needed to be consistent and use diverse media and forums. Based on this understanding, a decision was made to start a Facebook page to communicate with the wider community (M, 18/3/14). Months later, a decision was made to generate a webpage (M, 20/5/14). Finally, the group decided to communicate the vision in a newsletter with the inclusion of "what we were and who we are" (N, 1/7/14).

Despite sharing a belief that there was a need to establish a school, the participants interviewed expressed differing opinions as to who should be responsible for operationalising this vision. The question was, should it be the management group or the teachers in the school as they "are people who have a vision of the future possibilities" (RP2, p. 2) and have an "immense understanding of education" (RP5, p. 3). The group believed those teachers employed in the setup of the school would be powerful in translating the vision. However, Wilma held a different opinion, namely, that "the teachers will support and share the vision" (RP3, p. 4), whereas it is "the leader who takes ownership of the vision" (RP3, p. 4) and has the responsibility to ensure that the vision is enacted. Martin expressed the opinion that parents may have quite different visions from those of educators (RP5, p. 3).

Despite having agreed to a shared vision, it was interesting to note that there was an awareness that differing perspectives on power, control, inclusivity, and leadership would present

a challenge for determining who ought to be responsible for the interpretation and implementation of the vision, which would impact on future decisions. As a leader, I found myself constantly engaging with the team and other stakeholders (prospective parents, community groups), communicating and sharing the vision between the different groups to inform others of our intention to establish a school. Berber (2009) points out that while school leaders are setting and sustaining directions, the leader also needs to identify and articulate the vision, as well as foster acceptance of group goals to provide a direction.

In reviewing state documentation, I discovered a policy from the Office of Non-Government Schools and Services (2015) to "…satisfy the community support criterion, proponents of a non-government school development must satisfy there is a demonstratable, adequate and ongoing base of support, from families…for the school development that is proposed" (p. 2).

To make an application to establish a school, the group had to provide demographic data of the catchment area as well as the number of public meetings held to communicate the intention, and how and when these meetings were publicised. The state document also sought information regarding how information about the vision was published to foster community support for the school. While keeping minutes was a good way to track information and decisions made, we realised *The Working Document* was essential to keep all information in one place. *The Working Document* included our vision, mission, and philosophy. This core document was utilised to capture all the information that was regarded as important to meet the requirements in the multiple application forms. As the leader, I reviewed various required documentation, then communicated to the committee my understanding regarding the tasks or documents required, and delegated a distributed workload across the group. Berber (2009) concludes that a successful leader works towards consensus on vision and goal setting and distributes the work amongst the team.

Reflection

In hindsight, I recognise that my role as a leader was to influence people to understand the value of our vision and provide transparency regarding the unique intent of a school, not only for the management group but also to inform the wider community. At this stage in the development of the school, the participants who were interviewed disclosed differences of opinion regarding who should have the responsibility to implement the vision. According to Kotter (2012) communicating the vision effectively and how it will be achieved is the key to gaining the commitment of the workforce and everyone, in this case the volunteer planning committee, has ownership of the vision. As the leader, I made time to "communicate in a concise, candid, heartfelt, manner" (Kotter, 2005, p. 90) as a priority. The role of leadership is to maintain the initial motivation and to still get others to "buy-in" and become involved in the change process (Kotter, 2012). Therefore, communicating the vision "needs to reach everyone in the organisation who will play a role in making it a reality" (Kotter, 2012, p. 90). The teachers, the board, and the Principal are all part of the same organisation and all have a vested interest in sharing the vision.

I learned during the development process that it was important to keep communication open and impactful to ensure the initial group who designed the vision maintained active engagement. As the stakeholder group expanded, at times the initial planning committee would refer to the vision, mission, and goals during meetings (J, 14/5/2018), which enabled others to understand the goals and direction of the plans and aspirations for the school. This ongoing reference to the initial core documents reinforced the original volunteers' own commitment and provided new members with increasing clarity of the purpose, which ensured that there were shared understandings for making the vision a reality (Kotter, 2012).

Empowering people to develop a governance framework

Kotter (2012) described that eventually an organisation must move beyond planning and discussion to practical action, a stage which involves development of supportive structures and an environment which encourages people to take risks in pursuit of the vision.

Two critical elements of compliance with the requirements and significant steps in becoming a school were the creation of our governing structure and becoming a Body Incorporated, elements that had a significant impact on the participants. The planning committee needed to consider how

to operationalise their ideal intentions, and they realised they would require legal expertise. One of the members of the planning committee, who was a lawyer, provided the following advice:

> The success of a school depends on the way it is managed. We need to design a specific system by which to operate. The people within the school system (should) work within a governing framework and are required to establish a clear governing structure. Schools are typically a Body Incorporated and are not for profit (M, 8/1/2013).

Information from the lawyer was examined and a flow diagram (Figure 2) was designed to encapsulate the steps needed to establish the school (M, 1/2/2015). The diagram guided what was required to form the organisation and begin the establishment of the school (M, 3/2/2014).

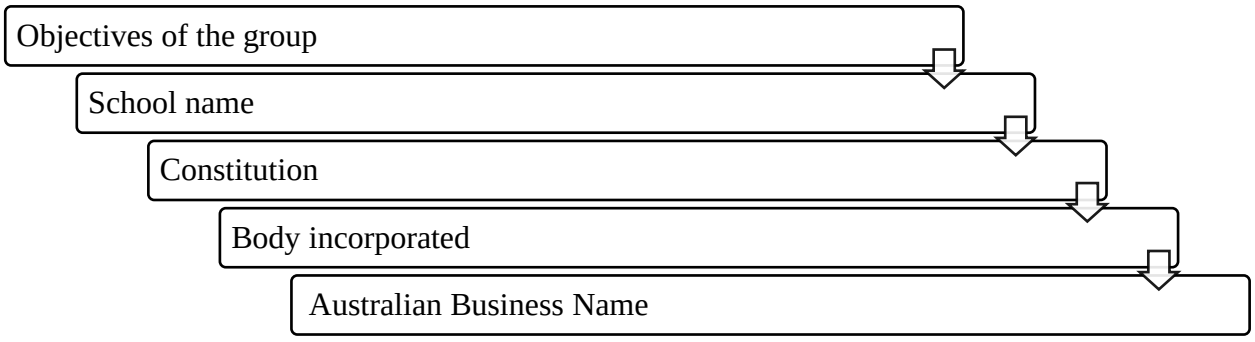

Figure 2. Flow diagram for foundation of the organisation

As a group, we considered it important to also establish our own identity. One aspect of this was to choose a name for the school that would be registered as an Australian Business Name (M, 27/1/14). As a leader of the group, I actively encouraged thinking "outside the square" and to consider new ideas (Kotter, 2012). One member stated that "we can't keep calling it *The Schoo*l, we need to find a name*"* (J, 1/9/2013). One member of the group undertook some research and presented a concept to the group for consideration, suggesting Dara Village School, which had several meanings in diverse cultural contexts (M, 8/10/13):

- Compassion and Wisdom/Pearl of Wisdom in Hebrew.
- Star in Cambodian.
- Leader in Turkish and Punjabi.

- Wealthy and Prosperous in Persian.
- The Beautiful One in Swahili.
- Oak in Irish.
- Gift in Bulgarian and Macedonian.
- Short form of several Yoruba names that mean “God is Good!”

The group unanimously voted for this name for the school (M, 8/10/13).

In becoming an incorporated entity, the group had to:

- Draft a set of rules (the constitution).
- Complete an application form.
- Nominate a person to act in the interest of the group.

The planning committee reviewed the *Associations Incorporation Act* (1985) under section 18 (1), which sets out the eligible purpose criteria and the rules that must be included. To assist the development of the constitution, an example from the Consumer and Business Services (CBS) template and the “How-to” guide was reviewed by the planning committee. Based on this information and utilizing the template found on the CBS website (Attorney-General's Department, 2014), the planning committee drafted the first constitution (J, 18/1/14). During a February meeting, we discussed the draft constitution to ensure that all required points were covered, which enabled all members to be familiar with the document and ask any clarifying questions (M, 17/2/14). The constitution was submitted in late March 2014 to Consumer and Business Services. In April 2014, a certificate of Incorporation was issued under the Associations Act 1985 Section 20 (1).

Consequently, the governance documents (*The Constitution*) provided:

- Organisation’s legal name.
- Objectives.
- Directions regarding the not-for-profit status of the new independent school.
- Rules and processes that outlined the way the organisation would make decisions, the way it would be governed, and how it would be “wound up”.
- Formalised governing structure that included a chairperson, vice-chair, treasurer, secretary, and seven members.

- Articulation of the responsibilities, duties, and manner of appointment to the school board for its members.
- Guidelines for management and control of funds.
- Guidelines for when and how the common seal would be used.

The Certificate of Incorporation is evidence of an association's corporate status and is used to open bank accounts and apply for state and federal funding and grants. Up until this point, the group was a planning committee. At the April 2014 committee meeting, all positions were declared vacant, and the members voted for those who would take the various roles (M, 15/4/14). From this point forward, the group became officially a governing body, providing a foundation on which to operate. The legislation required the organisation to be a Body Incorporated supporting the group's core mission to establish a school with a special focus. This momentum continued and the board also completed the following:

- Registered the name for the school.
- Obtained an Australian Business Number.
- Opened a bank account.
- Gained status as a not-for-profit organisation from the Australian Charities and Not-for-Profit Commission (ACNC).
- Obtained a Tax File Number from the Australian Tax Office.

Reflection

Not knowing where to start had been a significant initial barrier experienced by the planning group. To enact the vision, people within the group needed to be motivated and possess the means to realise it (Cohen, 2005). At this stage in the development of the school, the focus was on removing barriers and encouraging people to take risks to be innovative (Cohen, 2005). As the leader, it was important to communicate and receive feedback regarding what needed to be undertaken and when. Kotter and Cohen (2012) maintain that communication is crucial in this step, as a leader needs to be clear, direct, timely, and transparent in identifying and removing the barriers. We were fortunate to have a lawyer within the planning group who provided the information outlining Section 75 basic requirements for approval (Australian Education Act (Cth), 2013). From the basic requirements, a sequence of steps was formulated, providing the starting point. Within a very short period, the board was able to navigate the process (refer to Figure 2). The process of writing a constitution facilitated

our expression of our goals and beliefs and the generation of clear objectives, structure, and responsibilities for the new school. The regulations themselves were enabling, assisting the board to identify and work through important tasks, such as being a Body Incorporated and not for profit.

During this stage, I learned that knowledge about where to find the information was important. It was also important to have specific expertise within the board; for example, having a member who could provide legal advice for interpreting the regulations was an advantage during this phase of development. Finding solutions to potential barriers needed to be achieved quickly to maintain the momentum for designing the school. Without efficient and accurate attention to challenges, "people can become so frustrated in their attempts to do things right that they often give up" (Cohen, 2005, p. 127). As a leader, I instinctively responded to dealing with the barriers represented by our lack of knowledge about where to start by contacting the Education Standards Board for advice and asking members of the group to search for a solution prior to the next meeting. This kept the level of urgency to achieve our vision at the forefront (Cohen, 2005) and required trust in each other to accomplish the associated tasks (Brock et al., 2019). Cohen (2005) argues that when the vision is inspirational and communicated well, it generates the excitement to motivate people to achieve and is critical to success.

Creating a school structure and process

Kotter and Cohen (2012) describe this stage as characterised by short-term wins. The short-term wins are considered crucial in an organisation's change process or in start-up projects, as they counteract negative influences that may otherwise impede progress (Mwangala, 2014). Short-term wins provide an early taste of victory and provide insight into the realisation of the vision (Kotter & Cohen, 2012). School systems are designed based on values or ideals that will influence how the school and features of its curriculum are designed to enable students' achievement of aspired learning outcomes. Most importantly, the values help to define what teacher capabilities and dispositions are central to educate a particular cohort of students.

Defining school values

The initial core values espoused by members of the board were the inspiration behind the goal and purposes for providing an education program tailored to support gifted children. At the

beginning of the journey, members of the committee did not know the regulations or understand their purpose. However, once the board understood the purpose of developing school values, it was able to make a commitment to a shared purpose for the school, providing an important foundational pillar (Gurley et al., 2015). DuFour and Eaker (1998) claimed that core value statements answer the question, “How must we behave to make our shared vision a reality?” (p. 88).

While there was agreement about core values for the school, the diverse and strongly held personal values among the board members regarding establishing a school were evident from the outset. During the interviews, Martin valued his identity of himself as a learner, as “it means I have an understanding of knowledge” (RP5, p .2), and expressed the view that “we are all learners on the long journey of life” (RP5, p. 2). Nigel described a system of education that enabled children to “progress at their speed, and that you need to individualise the program for those kids” (RP2, p. 6). By contrast, Anita’s view was simply that she believed it was important that all those involved wanted the best for gifted children. The board was very passionate about meeting the needs of gifted children, and “this passion was based on (their collective) deep understanding of the theoretical, research and professional practice base” (RP3, p. 1). Whist the ideas are founded on research in gifted education, Sally was concerned that community members might view the school as “experimental”. What she valued most was that there was a clear identity as a credible school that would provide sustainability and security into the future. While the personal values of individuals might vary, Blanchard and O’Connor (2003) contended that “When aligned around shared values and united in a common purpose, ordinary people accomplish extraordinary results and give their organisation a competitive edge” (p. 144).

Beliefs and values of members of the board became clearer and more succinct the more they were shared, a deliberate process in which all members of the board were asked to write all the values that they believed should shape the school. A list of 15 core foundational or organisational

values were identified (see Table 9). Common elements were identified that were agreed were important (J, 23/9/2015). However, the election of 15 values was considered too many to share in a public statement, particularly if they were to be understood and remembered when explaining to others (J, 23/9/2015). The board spent time exploring the long list of values and regrouped them based on common themes until the board was left with three discrete values: integrity, excellence, and empowerment (Table 9).

Table 9

School core values developed from individual values

Individual Value	Core value	Intent or Goal
Honesty Trust Authenticity Openness Honour Loyalty Reliability	Integrity	To be honest and respectful, and to have strong moral principles.
Improvement Innovation Courage Open-minded Curiosity Originality Creativity	Excellence	To strive for one's personal best in all endeavours.
Resilience Tenacity Independence Optimism Aspiration Motivation Wellbeing Aesthetics	Empowerment	To empower talented people to take the initiative. To participate in opportunities promoting change and innovation. To lead when able and follow when needed.

The board decided on the following phrase, to encapsulate all the values:

> We wish for students to grow into adults who have **Integrity**, strive for **Excellence**, and are **Empowered** with a sense of purpose and optimism for the future. (M, 4/12/2015)

Nigel reiterated the importance of the process and outcomes to achieve the school values and that the significant amount of time and attention to them had clarified the values (RP2, p. 5), so that they were inspirational and meaningful (Table 9) and would help to convey the purpose and vision to the wider community.

Sharing their personal values and establishing the school's core values motivated and energised the board when confronted with the challenges of complying with the required government regulations. The board was united in the view that the core values indicated the school would serve an important purpose and that the values would guide decision making.

Defining giftedness

The board had chosen a definition of giftedness from Subotnik et al. (2012). The rationale for the school choosing the definition was included in the Working Document in 2015 as it addressed more than the development of giftedness and talent within the school context. Important features of the definition included that it provided a process, involving looking for *potential*, then looking for *achievement*, and, hopefully for some students, their level of achievement leading to *eminence* in later life. It is not the task of the school to decide that all of its students will attain eminence, but rather to assist them on their journey by providing a curriculum that is suitably rigorous and challenging.

The definition also made clear that the cognitive dimensions (concerning school subjects) and psychosocial dimensions (concerning personal characteristics) were dynamically related, and, with assistance from teachers, can be developed through effort and perseverance. Psychosocial variables include a growth mindset that focuses on the importance of effort, resilience, and positive motivation, as well as the ability to recover from failure, to receive criticism graciously, and to ask for help when required (Worrell et al., 2019). Finally, the definition explicitly addressed measurement by referring to cognitive and psychosocial variables.

There were tensions regarding terminology, such as “Do we use the word gifted? Do we use the words high potential?”. Such tensions are illustrative of the problematic and fragile nature of trying to work harmoniously and gaining agreement in a contested space. Sally believed “a lot of parents don’t see our children as high potential children, rather children that need special care” (RP1, p. 6). Sally did not want special provisions introduced that might hinder the child intellectually or force a child to perform at a level that they were not comfortable with or were unwilling to navigate. Whilst Anita described her values as being very similar to the rest of the board, she felt that her values for children who were both gifted and had a disability (twice exceptional) were not given enough consideration. She valued a respect for diversity within the gifted population and felt this specific group of children needed to be catered for (RP4, p. 1).

Defining a selection entry process

The next step was to work through a clear and transparent application process that reflected the school’s overarching philosophy and values, to provide an education for gifted students. The board intended that the process would be managed in an equitable manner.

In response to the question “How are we going to select students for the school?” (M, 15/4/2014), the board deliberated for answers over several meetings. This complex question required a great deal of thought, as gifted students are not a homogenous group: they show significant variation in their learning profiles, strengths, and social and emotional domains.

The board was very pragmatic during their discussions and very quickly ruled out using a selective entry test. The board felt that using an entry test would only select students who may be high achievers and good at sitting tests (M, 15/4/2014). It was also noted that administering the test would be labour intensive for staff and their energy could be better utilised in teaching (J,20/5/2014). While we may have selected gifted students in the mix, it did not appear to be an equitable practice to embrace.

The board did not have any experience with IQ tests or other psychometric tests and were guided by opinion or personal experience. They also did not include an expert, in regard to psychometric testing, in the discussion and some of their comments are based on misconceptions. However, they were concerned about using a fixed IQ cut off score as the only entry point to the school. The concern was that students' results may vary depending on the day they sat the test. One board member mentioned, "a gifted student may answer questions in a more abstract way. Their answers are not necessarily wrong, based on their logic, yet they could fail parts of the test, as they do not match the intended correct answer" (J, 14/6/2014). Several board members believed reviewing subtests results and psychologist summary within the report, to be a better option. Other members of the board felt that more was required than a psychologist report (J, 14/6/2014).

The board continued to ponder the selection process and also contemplated motivation as a factor to consider in the student selection process: put simply, whether a child wanted to learn and attend the school. Two statements illustrated the debate: "We may end up with unmotivated and unimaginative students who all have high IQs, who just do not want to be here, and this could be problematic" (M, 14/8/2015) and "We need to consider a well-rounded student with high intellectual abilities, who are energetic, enthusiastic and creative, and want to learn" (M, 19/1/2016). It was at this point the board consented to have multiple methods to determine the child's giftedness. These methods could include: NAPLAN results, competitions results, portfolio of work, referrals from other schools, nominations from teachers and parents, and cognitive psychology tests.

The board acknowledged that "gifted students in all of their diversity, needed to cover a broader range of identifications" (M, 23/2/16), yet how to manage this was a difficult prospect. Three specific criteria eventuated from the discussions. The application process needed to include: indications of cognitive ability, indications of achievement, and anecdotal evidence to support the application to the school (Table 10). The different methods of identification were placed under the related criteria.

Table 10

Extract from application form

Provision of evidence in support of the child's giftedness is part of the application process. Please ensure a minimum of **ONE** criterion from **EACH** section is addressed where possible and evidence is attached.		
Cognitive Ability	**Achievement Test(s)**	**Anecdotal**
Psychologist's report	NAPLAN results	Current school report
Woodcock Johnson III	UNSW competition	Parent Nomination
WISC	PAT Reading Comprehension	Student Questionnaire
AGAT	PAT Mathematics	Teacher Nomination
MYAT	ICAS competitions	Other
Stanford-Binet	Olympiad Competitions	
MENSA Member	Australian Math's Competition	
Other	Weschler Individual Achievement Test (WIAT)	
	Other	

The board believed the application process would allow for flexibility, facilitating a more holistic way to consider each applicant individually, with a final decision of acceptance being reached after the child and parent(s) had been interviewed. The Board acknowledged that the final design of the application would require further refining as the school became operational. It remained to be seen how well the process worked, whether the application process captured a cohort of gifted students, and whether we needed to include motivational criteria to capture potential (M, 14/8/2016).

In summary, defining the term gifted is problematic at the best of times, and implementing an application process is just as daunting. While the regulations did not require a definition or an application process, the Board valued the decision to define the term gifted and recognised the value of creating a relevant and deliberate application process.

Constructing a curriculum

Deng (2017) posited that curriculum is constructed in terms of societal, policy, programmatic, and classroom factors that give social meaning to normative and operational frameworks and educational quality to the practice of teaching. The current Australian education system is age-based, grouping students in year levels of the same age and assuming that there will be similarities in their social, physical, and cognitive development (Masters, 2015). In interviews, participants made the case to support children who required a "faster pace" (RP2, p. 3) or had already mastered the curriculum set for their age group. Nigel supported this view, stating "every kid [is] an individual and they progress at their speed, and you need to individualise the program for those kids" (RP2, p. 5). The goal was to have a curriculum structure that would provide opportunities for acceleration in which students could access subject(s) at a level that aligned with their ability. Overall, this would "provide an environment where everyone is given the opportunity to achieve their potential" (M, 8/10/2013).

In my journal, I reflected that what was needed was a curriculum that provided a "well rounded education" and would reflect the school's identity, challenging gifted children in an environment that would cater to their differences and enhance their learning (J, 15/11/2013). The primary intention was to design a curriculum that would support students not only academically, but also socially and emotionally. Based on these premises, a set of principles were developed, so that the curriculum enables:

- the support of social and emotional needs of students;
- a nurturing environment;
- students' individual differences;
- acceleration by topic;
- a student-centred model;
- strong student-teacher relationships; and
- focus on preparing students to be global citizens.

While it is not unusual for schools to aspire to similar values, the ability to accelerate individual students on a topic-by-topic basis, and the emphasis on supporting differences would be relatively difficult to achieve in a traditional school environment. Most schools find themselves limited in the level of individualised adjustment to the curriculum that they can provide (Kronborg, 2018b).

While the board had an understanding of the particular type of pedagogies required for gifted students, any curriculum framework chosen would need to be compliant with registration. The board also needed to consider "the nature and content of the instruction offered as well as provide an educational philosophy and curriculum policy for the year levels of intended operation" (EECSRSB, 2016, p. 3).

The curriculum frameworks offered by the Education Standards Board were the Australian Curriculum, the International Baccalaureate, Montessori, and Steiner. Choosing which curriculum framework to use caused some tensions and debates within the board. While the challenge was a shared problem, solutions were at times contested. Anita assumed that the Australian Curriculum was mandated and expressed the opinion that it therefore "is not the best for gifted kids" and that "you would have to somehow work around it" (RP4, p. 7) to support a gifted child. She highlighted the fact that the Parallel Curriculum Model (PCM) is "brilliant" and, used in conjunction with the Australian Curriculum, would support gifted students both socially and academically (RP4, p. 3). The Parallel Curriculum Model "emphasises the organisation of content around essential facts and skills, as well as deeper conceptual understandings" (Jarvis, 2018, p. 99) and provides a framework for students to explore content through four conceptual "lenses" to enable rich, rigorous learning experiences (Jarvis, 2018). Anita also held the opinion that we should differentiate within the classes rather than use acceleration (RP4, p. 3). The board discussed at length the specific interventions that would be required to support the gifted child (J, 12/3/2017), Over time, Anita could see the

benefits of acceleration and stated, "(I am) not against acceleration, and I personally think subject acceleration is better than whole grade acceleration" (RP4, p. 3).

While Nigel acknowledged that some students would be actively learning at a faster pace because they have clear goals, a teacher would still be required to guide them (RP2, p. 3). Wilma highlighted the "importance of the student-centred approach, with small classes, teaching to need/level, [enabling] access for all…" (RP3, p. 6).

Overall, the board discussed an approach that would require a relevant curriculum that could address one or more levels above students' chronological age and enable student acceleration by subject. Ability grouping at current learning levels in each subject area was the obvious choice and was possible within the broad guidelines of the Australian Curriculum Diversity document (M, 12/3/2017).

Designing and determining which curriculum would be identified within the regulatory framework was a period in which the values and ideas of individuals on the board did not always resonate with other board members. There were times on the board when it was difficult. For example, Anita felt that "…my values or my ideas were not being listened to. [It may have been due to] …the way I portrayed them" (RP4, p. 4).

The board cross-checked Education Standards Board requirements with the curriculum of choice to ensure that the application for registration as a school did not impact on funding. It was important to ensure that the school was eligible to be considered to receive financial support. According to the Australian Education Act (2013) subparagraph 77 (2) (b) the approved authority implements a curriculum in accordance with the regulation. At a state level, the Education and Early Childhood Services (Regulations and Standards) Act 2011 states that "the nature and content of the instruction offered, or to be offered, at the school is satisfactory" (Subparagraph 43 (1) (a)).

Furthermore, subparagraph 9 (1) states that a school "maintains high standards of competence and conduct by providers" and:

> (a) recognises that all children should have access to high-quality education and early childhood facilities and services that—
>
> (i) address their developmental needs; and
>
> (ii) maximise their learning and development potential through an appropriate curriculum; and
>
> (iii) support their educational achievement; and
>
> (iv) promote enthusiasm for learning; and
>
> (v) support, promote, and contribute to their health, safety, and well-being.

Regulations at a state and federal level did not stipulate which curriculum was to be used. During our meeting in March 2015, a draft paper on curriculum was presented for discussion, and, following this, the board decided to use the Australian Curriculum. This was because it was thought to provide a flexible curriculum framework that could support the chosen curriculum principles, while the other curriculums were considered to be "too rigid" for our use (M, 24/3/2015). The board also considered several policies that would be required based on reviewing the registration application and Education Act. The policies would need to cover the pedagogy underlining the educational delivery, the types of resources needed, and an overarching assessment and reporting process.

In summary, at meetings, the board affirmed the purpose of the school, built unity within the decision-making group and cemented a shared commitment to the work to be done. We valued the provision of an education tailored for gifted students, utilising the Australian Curriculum, which also acknowledged that subject acceleration was available while meeting educational regulations. Making the decision to utilise one of the preferred curriculum options was a critical moment because it allowed the school to not only receive funding at both the state and federal levels but also to comply with registration criteria. While this aspect of the registration was a hindrance at the time, addressing each criterion fully helped to guide the board and ultimately did not compromise

the established vision, mission, or values. We also improved our collective awareness that we would have gifted students with disabilities who would need to be catered for within the curriculum.

Choosing teacher capabilities

The board was aware of the research findings regarding the need to have suitably qualified teachers (Long et al., 2015; Vialle & Rogers, 2012). However, during meetings there was still some ambivalence regarding the types of qualification that should be required. According to the *Teachers Registration and Standards Regulations (2016)* "teacher means a person registered as a teacher under (the Act) and includes a person who holds a special authority to teach under that Act" (Education and Early Childhood Services (Registration and Standards), 2011, p. 17).

It was noted that teachers were not required to hold any specialist training when teaching students with a disability or high intellectual potential. A teacher can be in essence a generalist and can teach age groups based on their initial training. Teachers can also be disciplinary experts who teach high school, such as mathematics or chemistry at year 12. The question was, should we employ teachers who have a demonstrated understanding and experience with students with high intellectual potential or should we expect all teachers to have a post-graduate degree in gifted education? (J, 17/6/15).

Over the next few months, a compromise was reached. The new school was going to specialise in gifted education and so we needed teachers who understood and could teach this cohort of students. It was decided to employ teachers who had experience in gifted education and who held a post-graduate degree in gifted education or who were willing to achieve such a qualification (M, 27/9/16). This decision captured the essential qualifications for the job and person specifications for employing teachers for the school (see Table 11).

The board also considered the working conditions for teachers and wanted to attract the right teachers and offer incentives to work at the school. Sally pointed out that class size was an

important element as she believed that “teaching 10 of our kids is not like teaching 30 mainstream kids” (RP1, p. 18). She also thoughtfully pointed out that “we’ve got to be careful to manage burnout rates, the board must support the Principal with teacher workloads, so we do not lose our good teachers” (RP1, p. 4).

Table 11

Extract from job and person specification for a teacher

Essential qualifications
Hold recognised tertiary qualifications and experience relevant to teaching Hold, or be willing to undertake study towards, a Graduate Certificate or higher in Gifted Education Be registered to teach in South Australia and hold a current South Australian Teachers' Registration Board Certificate Have current eligibility to work in Australia
Teachers must have an understanding of
Students • Characteristics of giftedness • Characteristics of giftedness combined with other diversities Content • Deep level of knowledge and understanding. • Expertise in teaching at least one discipline in the Australian Curriculum Process • Catering for gifted students' learning characteristics • Considering philosophy, principles, and practices of curriculum differentiation • Planning, implementing and reviewing curriculum for gifted students • Developing Unit Plans and Lesson Plans for gifted students that are based on clear learning intentions and success criteria • Using models of best practice in gifted education Environment • Catalysts that develop talent within and without a school environment • Purposeful and flexible grouping of students • Development and maintenance of a supportive and inclusive learning environment • Development and maintenance of a physically, affectively, and intellectually safe environment • Provision of appropriately challenging learning opportunities that honour what students have already mastered Resources • Resources that are discipline-authentic • Digital technologies • Assessment tools

The Board had considered that teachers would need to have more time to plan due to the depth and diversity of individualisation of the curriculum that would be required. Furthermore, team planning meetings should occur during the day (M, 12/5/2015). “If you have happy content teachers” (RP1, p. 18), “you have a better school environment” (RP1, p.19). The Board had also determined that “if we want to have the best teachers in the state, we need to have some of the most competitive salaries” (M, 20/5/2015). These teachers must therefore be rewarded financially and have incentives to gain their higher degrees in gifted education (M, 20/5/2014).

In summary, teacher qualifications were considered to be an important element for the school. With this in mind, it was acknowledged that support, time, and financial reward were important conditions, not only to keep experienced staff, but also to attract new high performing staff to the school. Whilst the regulations state that the staff should be registered teachers, the Board particularly wanted staff experienced in gifted education. There were significant differences within the Board as to how to achieve the right balance between experience in teaching and in gifted education qualifications. The debate continued over many Board meetings and was settled with a comprise of experienced gifted education teachers who had a qualification in gifted education or who were willing to obtain such qualifications. The Board placed a high value on all teachers being suitably qualified and committed to establishing working conditions that would enable them to address the complex needs of these students.

Appointing the first principal

A principal as defined by Berber (2009) is a “person who has a designated role, acts as a leader and provides direction; manages both human and material resources; acts as a cohesive factor between students, parents, teachers and the community (that is, acts as a gatekeeper between the internal and the external elements); and exercises influence to inspire others” (p. 42). There are a number of important factors when appointing a principal to a new school. Principals in newly established schools need to adopt multiple roles, such as educational leader, marketing

agent, as well as being a visionary leader who ensures that the mission of the school is achieved (Berber, 2009). Principals should also be people-centred and model values and practices that are consistent with those of the school (Sergiovanni, 2001). In the establishment phase, principals need to provide strategic leadership to determine the direction and school priorities through the efficient running of the school. They also need to set high standards for student learning and teaching (Berber, 2009).

The agenda for a June Board meeting included the "appointment of a Principal, should we open in January 2017" (M, 21/6/2016). The position was discussed at length and we considered that:

> the Principal is responsible for everything…and, in turn, the Principal is responsible to the Board. The job and person specifications are in draft form and all members are requested to review. If the position is advertised, then there needs to be a 'how to apply' section in the job specs. If we have a Principal delegate to fill the void until [we] choose to advertise. It was suggested by a Board Member that this is a new school, and we need to be viable, and we might have 12-month contracts for all staff. The Board concluded that we could word the [principal] contract for 3 to 5 years, and if the school folds the Principal's contract is dissolved with paid out holidays.

At this point, I was asked to leave the room so the Board could discuss the position. The only reference as to what was discussed was found in the minutes (M, 21/6/2016). It was proposed by the Board that I should become the principal delegate in readiness for the school opening in 2017 and, if I accepted, I would need to step down as chair:

> The Board concluded that Lynda will be an excellent Principal and notes she has worked the hardest on our journey… This has been her dream all along, and she is greatly deserving of the role. The board nominates Lynda as a Principal delegate, which will become a paid position from 1/1/17 (or earlier if deemed appropriate by the Board and subject to students being enrolled and a signed contract stating the above).

I accepted the position and resigned from the position of Chair of the Board. I had never really considered being offered the Principal position and felt quite honoured (J, 21/6/2016).

During the interviews, Wilma reflected that the role of a Principal, "required not only energy, but they also need to have their own vision" for the school (RP3, p. 3). She considered the chosen Principal:

> [someone] who led from the front. And I have to say that I have come to appreciate the amount of effort put into being Principal because nothing that I had read prepared us for the immense demand on time and energy that is starting up a new school. (RP3, p. 3)

The interview participants' perception was that the board's responsibility was to support the leader, to achieve the vision required to open a new specialist school for gifted students.

Reflection

Creating a school structure that provides short-term wins in a timely, visible, and meaningful way is critical in building the credibility needed to sustain (Cohen, 2005) a school. This is essential during the development stage of creating values, defining giftedness, selecting curriculum, selecting teachers, and appointing the first principal. These wins provide evidence that the process is working, as well as opportunities to adjust our plans and keep individuals engaged on the board (Cohen, 2005).

One of the challenges during this step of the process was establishing the school's identity. In the first instance, the group and then the board created their descriptions of what the school should be like based on research evidence, as we had no handbook or another gifted school to refer to as a model or use as a conceptual framework. The school framework was based on our ideas, beliefs, and experiences as individuals. Sally highlighted that using a "research base" suggested that we were an "experimental" school; whereas, we needed to establish our credibility to capture enrolments. This also required gaining trust regarding the viability of the school. In creating a market niche, the school's philosophy was specific to the school's context (Collier, 2001), and needed to be embedded in all documents, the school's website, and public social media. There was also a need to rapidly achieve success for sustained growth, because the first year can "make or break" a school's success (Evans & Lake, 1988).

With hindsight, it is now possible to see the gaps in the board's focus. While there had been considerable focus on which curriculum to use, there should have been greater focus on which teaching approaches would best deliver the kind of education required for gifted students. In considering whether a curriculum approach is appropriate for gifted students, Jarvis (2018) suggests a wiser question may be, "For which groups of gifted students does a particular curriculum or set of teaching practices have demonstrated effectiveness, in what setting/s and under what conditions?"

(p. 102). In principle, we knew we needed to determine what might be the best fit for our students. This type of questioning is necessary to ensure the decisions made for particular curricular and teaching practices are defensible, sustainable and will result in meaningful learning outcomes (Jarvis, 2018).

Whether students are able to utilize their unique abilities may depend on whether the appropriate educational intervention is available to them. While many educational interventions are available, the board would also need to consider the individual student's needs. Ability grouping and acceleration were two key educational approaches that were discussed by the board, as well as enrichment and problem-based learning. Although the curriculum is crucial, teachers' knowledge of appropriate strategies for gifted students is the key to student success (Chandler, 2015; VanTassel-Baska & Little, 2011).

Early on when I was chair of the board, I posed the question as to how a student-centred approach to learning could be adopted and argued that a "one size fits all" approach to curriculum would not be appropriate for gifted children. The approach we needed to take must be a student-centred approach that would support individual students' learning needs or characteristics and must also include the social and emotional needs of the gifted child. Changing the focus from curriculum to "what is the best fit for our students?", enabled a different type of conversation. The curriculum chosen was the Australian Curriculum and we recognised that we would use a wide range of interventions to support individual students' high intellectual potential. These decisions provided clearer information to include in our documents and website.

During this stage I learned that a marketing strategy was important, as was the establishment of a school ethos specific to the school's context. Most important was to select a curriculum and discuss a set of educational approaches that would incorporate the specific requirements for students with high intellectual potential. In hindsight, I think that I should have recruited a team not only from the board but also from beyond, seeking members with the appropriate background to specifically focus on the marketing aspect of the school, as the website and Facebook captured a particular market, and provide an identity, as we acknowledge the overall presentation could be improved. Douglas (2012) reported that the use of a marketing group to source potential enrolments, to develop a distinctive brand, and to develop a market niche. Both Collier and Douglas reported that it is important for a successful school's formation to have a distinct identity related to the ethos of the school (Collier, 2001; Douglas, 2012).

Establishing a School

The momentum created by short-term wins often propels the effort forward. Kotter (2014) asserts that victory should not be declared early, as the change or innovation may fail. He encourages urgency at this stage to keep people engaged and active. Without a sense of urgency, the willpower of volunteers will wane. During this final stage of the new school, there was a level of complexity that caused frustration, as there were two distinct groups: one group decreased their activity, experiencing the sort of lethargy that Kotter describes, while the other group was very focused on completing the application and establishing the school and maintained critical momentum and sense of urgency. The board needed to consolidate the work already undertaken and it was essential to maintain the energy through the establishment phase of the school.

The momentum created by short-term wins provided the board with motivation and a sense of urgency to tackle the biggest issue: to achieve compliance with the regulations. The focus was now on the more difficult, lengthy, and risky part of the journey: to provide the fundamental processes, structure, technology, and location for the school. There were also significant policies and curriculum that still needed to be written to be compliant for registration.

Compliance for registration

To achieve registration at federal, state, and local levels, schools are required to submit policies, procedures, prospectus, and curriculum that support both the regulations and the specific needs and vision of the school. In this instance, we had to comply with the *Education and Early Childhood Services Act* (2011) at the state level. The application is then assessed by the Education and Early Childhood Services and Standards Board of SA under section 43(1)(a) and (b) of the Education and Early Childhood Services (Registration and Standards) Act 2011.

The board as a whole was quite naïve about the requirements at the beginning of this process. The statement that “starting a school is easy”, posited at the beginning of our process,

could not have been further from the truth. At this stage, there remained many more decisions to make and more paperwork to complete. The board's consultations with the Registrar of EECRCB were productive, particularly regarding his advice that we should complete the paperwork and submit ahead of schedule, whilst we were searching for a location. The board's first step of submitting a notice of intent to establish a school was completed on 19 June 2016.

Whilst the board as a whole was committed to enacting our vision, the process of accomplishing compliance was made more challenging due to the interplay of individual board members and of the process of compliance. In addition, many of the board members were working full-time. Wilma highlighted the fact that "real-life intruded on us" and we did not have a "decipherable set of instructions that would get a new school" (RP3, p. 1). The frustration at times was felt by some members of the group, as they continued to work hard even while other members decreased in energy and time that could be committed to completing the work needed.

Our strategy to complete the paperwork was to divide the document into the following sections and generate a checklist for each:

- Enrolment and staffing plan.
- Vision, mission, objectives, and philosophy.
- Curriculum.
- Policies.

The checklist and milestones to be achieved were tabled at a board meeting (M, 12/2/2015). board members were asked to volunteer to undertake specific documents to prepare and to present at board meetings for official approval (J, 14/2/2016). The first challenge was to outline the school's enrolment development plan, indicating the number of students expected to enrol, by year level, for the first 5 years. While this was a simple question, Nigel pointed out:

> If you're trying to be educationally "stand out" then you're actually trying to be a bit non-compliant. We (don't) want [students] in Year Level classes, and we knew that we were going to have kids that were, 9 years old, but who could be [working] anywhere between Grade 3

> and Grade 12...If we actually wrote down our learning structure on their form, we wouldn't be compliant and we would not get funding (RP2, pp. 7-8).

In my journal at the time, I reflected that:

> The year-level system is not what we had in mind when we designed the school based on the vertical grouping of ability. Perhaps we call this a "base grade level" of their age and not their ability. We just need to conform to achieve the goal (J, 14/2/2016).

Some questions asked for a vision, mission, and educational philosophy, which we had completed in the early stages of formation, and our values by this point had been clearly articulated as to our intent for the new school.

Having identified the curriculum framework we were going to use, the next challenge was to provide the pedagogy underlying the curriculum, indicate the resources that would be available to students, and provide an overview of the assessment and reporting process to be adopted. The EECSRSB also requested an overview of the topics for each year level and examples of units of work with lesson plans. As we had already decided on the Australian Curriculum, we used a curriculum planning process to write our specific curriculum. At this stage, I noted in my journal that "only two individuals took on the responsibility for writing all the curriculum components required to achieve compliance" (J, 1/7/2017). In interviews, some of the participants reflected that very little support was offered from the board at this stage, which "illuminated the different motivations of the group" (RP, p. 4). There were clearly two groups operating within the final stage of establishment: those with the drive to maintain momentum and those whose energy had waned.

Over 18 months, a wide range of policies to support our application were prepared (Table 12). During this time, the teachers on the board knew there were other policies that needed to be written to support the operational running of the school. It became clear that writing policy is a complex undertaking, so at this point we realised that we needed to enlist assistance from an expert in the field. This expert provided a template which we used as a writing tool to achieve a consistent approach across all policies and procedures and to guide our generation of a comprehensive policy

platform. This expert taught us that the function of policy is to identify "why and who" the policy is for, and the procedure explains "how" the policy should be enacted. Nigel also reminded us that policies are also governed by other acts or legislation, and these also needed to be considered when writing (RP2, p. 6). There was a large volume of policies to write, and the challenge was that many were interrelated and needed to comply with other legislation and acts. It is important to note in terms of the goals of this thesis that at this stage the legislative considerations did not impact or limit the original espoused values of the board – rather, the established values guided the writing of the policies. Policies that were prepared are listed in Table 12.

Table 12

Policies prepared before attaining registration

Policy	Policy title
Policy 1	Child protection
Policy 2	Medical and dental emergencies (includes procedures)
Policy 3	Anti-harassment Policy
Policy 4	Grievance policy (includes procedure)
Policy 5	Substance abuse/drug/possession of illicit drugs
Policy 6	Critical incident
Policy 7	Emergency evacuation
Policy 8	Camp/excursion
Policy 9	Private Motor Vehicle Use
Policy 10	Behaviour Management (not required for registration)
Policy 11	Gifted and Talented (not required for registration)
Policy 12	Enrolment (not required for registration)
Policy 13	An evacuation policy and procedure
Policy 14	Electrical Safety Policy
Policy 15	Playground Equipment and procedural checks
Policy 16	Storage of inflammable liquids
Policy 17	Occupational safety and welfare
Policy 18	Curriculum, assessment, and reporting

At this stage, the tasks the board members had to accomplish, apart from writing policies and designing curriculum, included completing governing documents, undertaking market research, designing a website, and securing finances. Ventures to secure finances were at times ad hoc, using a process of trial and error, and mistakes were made. To overcome these challenges throughout these processes, the board came to understand that it was important once again to consult experts, either to glean advice as to what was required or to ensure they had met the expected requirements. We applied to EECSRB in September 2015 with a significant number of documents. Not long afterward, we received a letter from the registrar that stated: "May I commend you on the submission that you have previously submitted and encourage you to complete the requirements listed in this letter as soon as possible so that the registration approval process can be progressed" (L, 19/11/2015).

Most of the requirements listed in the letter sought clarification of policies or the provision of missing policies.

Finding a location

The most significant remaining task was to find a location for the school. The board established several criteria for choosing a location for the school. It needed to be near public transport, centrally located, and easily accessible for families (M, 19/1/2016). The site would also need green space for play, outdoor learning spaces and, while the intention was to start small, would need to be able to cater to some degree of expansion in the future (M, 19/8/2014). On a practical level we also needed to submit a physical address to comply with the regulations.

Finding the ideal location was challenging and over time we learned several important lessons. The first was that specific building codes apply, and these codes provide the minimum requirement for safety, health, amenity, and sustainability in the design and construction of new or existing buildings. The Building Code of Australia groups buildings by their function and use and

assigns a classification in the range 1 through 10. Schools fall into class 9 (buildings of a public nature) which is divided into three subgroups: (A) health care, (B) education, and (C) aged care. So, in our search for a building, we needed to meet the requirements for a 9B classification within the building code. We needed a building that was fit for purpose, as we did not have the finances available to undertake an expensive refurbishment. Therefore, to use our limited time wisely and ensure compliance, we restricted the type of building we were looking for and considered a range of locations during our search (see Appendix 3), weighing up the feasibility and relative costs and benefits.

We narrowed the search to the West and South of Adelaide, as this appeared to be the place with the most potential, and we gained some property leads to follow from board members and other interested parties. We found a church and started to negotiate a lease, although, on closer inspection at one of our meetings, we discovered the zoning was for a *dance* school to operate between 4pm and 10pm (M, 14/9/2016). To change these hours of operation we needed to obtain a traffic report and submit a plan to the council. The council, in turn, would send a letter to all residents in the area to determine whether there were any objections, a significant cost in time and money. The final lesson we learned was that we needed to have the location zoned as a school by the local council.

As timing was becoming an issue, the board determined that, to find a location for the school, the search should be confined to schools in the immediate area that may have spare classrooms. The goal was to identify a school with a forward-thinking principal who could envision a symbiotic relationship that would offer reciprocal benefit for both schools. Finally, one was located, and we signed a lease with a local public primary school on 11 November 2016. The final application was subsequently submitted to EECSRSB and, just four days later, we received our

registration. The doors opened on 29 January 2017 with 14 students. A colleague turned to me and said, “We did it!”

That evening, I reflected in my journal how overwhelming yet exciting the day had been, and how full of emotions, with accolades coming from all over Australia. That day would be remembered by all those who took part in the process, particularly those who had been instrumental in the design of the school.

Reflection

On reflection, it is apparent that in the final stage there was still an enormous amount of work in obtaining registration, including the task of finding a site. The board’s emotions and frustrations were apparent. There were high levels of energy from some board members who engaged in policy or curriculum writing, in order to complete the requirements, while there were other members whose support waned. Cohen (2005) states that the key implementation challenges at this stage of organisational development have implications and residual effects on the momentum, which can be lost. These effects include that planned changes may be delayed, members may fail to be available for meetings, and decisions that have been made may be recycled as people have second thoughts (Cohen, 2005). While there were some practical reasons for being held back in this final stage, such as work or family commitments, it was primarily due to the complexity of the work undertaken and disappointments within the group, including exhaustion of members and dwindling team morale, all of which added to a sense that getting ready to open was far more difficult than originally thought. Suggestions for improvement at this stage of the school development are to stay focused, consolidate and delegate (Cohen, 2005) as well as to enlist experts outside of the board, and importantly, to celebrate the wins, however small. To help alleviate the burden on the two members who were currently working, I divided the remaining tasks into easily achievable tasks and asked, “who can help?” Members of the team gave support to the scaled-back remaining documents, while another team member, who was new to the board, was purely focused on locating a site.

The amount of paperwork required was considerable, and all of these activities, whether policy writing, curriculum development, or finding a building, require people who have particular professional backgrounds and expertise. In hindsight, it would have been helpful to have professional people lead a series of sub-committees, established by the board, with clear terms of reference and reporting dates. For example, we would have benefited from having a property committee, a

curriculum committee, and a policy committee that would have dispersed the workload between members and drawn on their special expertise, and empowered people to achieve specific objectives. However, we achieved our goal by "muddling through" (Lindblom, 2017).

In this phase, we made several compromises. It was clear that, if we did not find a site, we would not be able to register with EECSRSB, but luck was on our side, and we found a site in late October 2016. The other compliance challenge was having to describe year levels for student numbers. We decided to comprise on the requirement to refer to numbers in grade levels in order to complete the paperwork, rather than try to make the system accept our expectations of ability groups, and became registered in November 2016.

Operating a School

Anchoring a change is the final step in Kotter's 8 step model. The focus is on embedding the changes or innovation into culture and practice (Heckelman, 2017). When the doors opened on 28 January 2017, the operational phase of the school began. This is "when the school began to feel like a real school" as described by Douglas (2012, p. 61). As the school started to evolve, anchoring the new school and the innovative design required discussing the success of the organisation with staff, board members, and the wider community. The focus now changed to how the school would operate. The people involved needed to realise the dream had come to fruition (Kotter & Cohen, 2012).

In order to anchor the achievements, we had one final step to complete and that was ensuring the everyday financial viability of the school and that it had sufficient funding to be able to develop into the future. What remained after that was to monitor on-going development.

Financial viability

Financial viability refers to a school's ability to generate an income to pay rent and staff, to obtain resources, and, where possible, enable growth to ensure long-term stability. The "financial sustainability is of the utmost importance" … for the "school's longevity" (RP1, p. 11).

A new challenge was to gain an understanding of how to apply for state or federal funding or when this money would be forthcoming. An early problem that concerned the board was that we lacked expertise in understanding and drafting budgets and in financial forecasting. During our board meetings, one agenda item was always at the forefront: Where is the money going to come from? Have we found an accountant?

Nevertheless, as the school started to gain momentum, during mid-2016, we had managed to secure a loan from the Gifted and Talented Children's Association of South Australia (GTCASA) and received a substantial private monetary donation (M, 14/7/2016). The board also required a budget, especially for the first year, and we needed to develop a five-year business plan. We were not "commercially savvy" … "and we made some mistakes along the way. But then hindsight's always wisest, isn't it?" (RP3, p. 3).

A month before the doors opened, we found an accounting firm that specialised in new schools. Our meeting with the accountant provided us with the added expertise that enabled us to ascertain and understand the processes needed to achieve financial viability.

We found that funding came from three main sources: federal funding, state funding, and tuition fees. Applying for federal funding was relatively straightforward. Federal government provision of Australian Government funding to government and non-government schools is in accordance with Section 75(4) of Australian Education Act 2013 and Regulation 27 of the Australian Education Regulation 2013. It was interesting to note that a school can only apply for funding on the day the school opens its doors (J, 29/1/2017). The Australian Education Act 2013 (the Act) and the

Australian Education Regulation 2013 (the Regulation) comprise the legislative background for applying for funding.

Funding is applied for online by the principal, and the application required the following documents to be submitted:

- Certificate of Incorporation.
- Certificate of Registration.
- Certified copy of the Constitution.
- Enrolment of students by year level.

The application is approved by the Minister and must meet the ongoing policy and funding requirements (Sections 77 and 78 of the Act and regulations 29, 31-40 and 41-61). Federal funding is paid to the schools in three instalments in January (50%), July (25%), and October (25%).

What was ambiguous at the time, and provided another challenge, was the fact that funding to new schools would not be forthcoming until July. However, our newly found accountant was aware of this complication and advised us that, under the Act, a school can apply for funding to be brought forward. Authority was given to the accountant to act on the school's behalf. The funding was brought forward to April of the same year (J, 28/1/2017) enabling cashflow to pay for items needed, wages and amenities.

Applying for funding at a state level was a different process. We had to submit an application for state funding for a new non-government school to the Non-Government Schools and Services Unit in hard copy. The application required the following:

- Copy of council approval for use as a school.
- Catchment area for students.
- Identification of existing schools.
- Outline of school proposed and potential benefits to the wider community.
- Confirmed enrolments.
- Enrolment of students by suburb.

- Records of public meetings, publicity, and support from families.
- Ongoing support from the community.
- Copy of registration.

While, at first glance, this seemed to require a significant amount of additional information, the board and I were able to utilise a variety of documents that had already been written over the years to answer similar questions. We already had a working document, or feasibility study, and would continually add to the document as questions were asked about the school (Feasibility Study, January 2017).

The remainder of the funding was from tuition fees. The accountant managed all these processes, for which the board members experienced a sense of relief. The board felt secure and confident in the new financial stability, having the expertise of the accountant, which had been absent until now. Planning for the school's financial viability and management had been one of the most difficult challenges.

> We need a conservative board right now to enable that to happen. So, growth, sustainability, and continuity. Not a big bubble that explodes, that we cannot handle. The general conversation in the board seems to be that's where we are at. (RP1, p. 3)

The board's objective was to design a school for gifted children. Obtaining financial predictability and sustainability had been perceived to be an obstacle to achieving that core goal. Getting to this point required determination and blind faith, and certainly our lack of relevant of knowledge had not been a deterrent. When the accountant provided a budget for the next twelve months, we could see that there was no longer a need to worry and that the school would be financially viable.

On-going development of the school

At the time of writing, the school is in its fifth year of operation. In our first year, we opened with fourteen students, two teachers, a part-time receptionist, and a principal. The first year largely

focused on answering inquiries, developing further policies and procedures, and attending to paperwork that we had not thought necessary during the development phase.

In our second year, we received a letter advising that a "*Validation Review of Registration* of meeting the *Standards for Registration and Review of Registration (the Standards)"* was to occur between February and July 2018 (L, 28/1/2018). The standards were different from those we had addressed when we had first registered. When I obtained a copy of the new standards to determine how these varied from our original registration it was clear that we had a significant amount of work to undertake, as there were many more policies and procedures to include.

The third and fourth years focused on finding and moving to a new site for the school, as we had outgrown our temporary site. In April 2020, amidst a pandemic, the school moved to another site. As part of this move, we obtained approval from Education Standards Board (2017) for the new location, as well as the capacity to increase our year levels from reception to Year 12.

Our fifth year was substantially settled. The number of students increased to 56, along with five full-time teachers, a full-time receptionist and full-time Principal, and we have just advertised for a Business Manager. The school enrolment and staff numbers continue to grow each year.

Reflection

During the years of preparation in drafting documents and discussing school design, the board knew we needed an accountant to assist with financial understanding and to develop a budget. Whilst some members of the board had some awareness of budgets, none felt confident about obtaining funding at state and federal level, nor about the overall budget management in running a school. The Commonwealth Education Act 2013 provided information in Part 4, as to how funding is calculated for schools, which we found difficult to follow. We needed an expert not only with financial understanding and expertise, but also knowledge regarding how new schools operate financially.

Obtaining the services of an accountant just before the opening of the school was a most welcome and important accomplishment. The support provided in the first six months of operation allowed the board to readdress the future financial plan, ensuring we had financial viability into the future, and the ability to pay wages, as well as purchase the resources required. On the other hand, funding is not normally paid for several months after the school starts to operate, which was a hindrance.

Berber (2009) identified that financial security from government funding was critical during the establishment and further development of a school. Creating a new operational structure with a sufficiently strong organisational culture provides the foundation for the new school (Cohen 2005). The collaborative leadership that has been embedded during the years of design now focuses on making the formal systems part of a new, supportive, and sufficiently strong organisation.

While our values and goals were clear, without the accountant I am certain that the money required may not have been sufficient to establish the school, as we did not know what was needed as a baseline. It has become obvious during this journey that the expertise required is not only about the technical aspects of accounting but also the bigger picture relating to school funding, especially when starting a school. I would recommend to any group contemplating starting a new school to employ a Business Manager at the earliest opportunity, to take care of the planning and management of financial and property aspects of the school.

Summary of Findings

Through the interviews, minutes, my journal, critical friend discussions, and other documentation, a vast array of information was gathered to assist with generating this retrospective analysis of the processes and challenges of this groups' intention to establish a school for gifted children.

What was achieved and what made that possible

After four years of development, we opened a school with a specialist focus on gifted education. We were unable to locate a template or a handbook to guide us on the journey, but, despite this, successfully established Dara School as the first dedicated independent R-12 school for gifted students in Australia. The number of roadblocks on our journey was largely due to our collective inexperience. However, the determination of a group of individuals who were committed to a vision, established a school that primarily focused the educational design on meeting the unique needs of gifted children. The collaborative, distributed leadership approach adopted at the start was an important element in establishing clear milestones along the way to make the final goal possible.

The articulation of shared core values sustained the group's motivation throughout the journey, especially when faced with the challenges of compliance with the government regulations.

How regulations enabled success

Although we began with regarding the regulations as a minefield and an obstacle, as we progressed we found the Australian Education Act 2013 *Section 75 (2)* provided us with much needed guidance. The Act clearly stated the expectations that were required to ensure we received funding, namely, that we should be a Body Incorporated, not-for-profit, and financially viable, in order to be a registered school. These requirements were followed by the group, and later the board, to ensure that funding would be forthcoming. A constitution was written and formed the initial structure for the school as well as a not-for-profit Body Incorporated through obtaining advice from a legal expert.

To ensure the board made the correct decisions as to curriculum choice, the board cross-referenced the requirements from the Education Standard Board with the Australian Education Act (2013), as well as the Education and Early Childhood Services Act 2011 to ensure the school would be eligible for funding from both Federal and state authorities. While the Acts did not state which curriculum should be used, it referred to high standards and addressing the needs of the students. Based on the choices provided by the Education Standards Board application form, the Australian Curriculum was chosen.

According to The Australian Education Act 2013, the state minister approves schools in each state or territory. The *Education Act 1972*, however, did not give us any relevant understanding of what was required. As a result, we decided to review the Education and Early Childhood Services Registration and Standards Board of South Australia policy documents, and application forms to generate the information we needed to gain registration. Within these documents we found answers and guidance. As a board, we needed to provide enrolment projections, a staffing plan,

vision and mission, objectives, philosophy, curriculum, and certain policies. This provided the checklist to achieve compliance.

How regulations challenged or limited our ideals

The regulations overall actually supported the establishment of the school, despite the fact that there was an enormous amount of paperwork that needed to be completed to ensure the safety of the students was at the forefront. Our major contention was the difficulty of completing the paperwork based on year levels because to do so compromised a significant aspect of the educational program, namely, to allow students to be organised in ability levels across the curriculum. Gifted students may need to be accelerated in different subjects or disciplines at different points in time. It was difficult to work out how to apply our model within the current regulations and the issue of student grouping at their level of ability was a motivating factor and a first order principle for establishing the school. Our solution was simple: we identified the student's base grade according to their age when submitting the paperwork.

What could have been different

As a result of retrospective reflections and critical analysis of related scholarship, changes could have been made in a number of areas, as outlined in the following subsections:

- Using a different governance structure.
- Building a team.
- Recruiting expert help and advice.
- Leadership and management.

Chapter 5 will refer back to these findings to answer the research questions and to consider the implications for practice and research.

Using a different governance structure

During the course of my analysis, it now seems apparent that a less demanding path to registration would have been for the board to have established specific sub-committees or working

parties to focus on a particular element of the organisation, such as marketing, policy writing, curriculum documentation, and property development. As Douglas (2012) and Collier (2001) both stated, forming working parties early in the life of a school helps to contribute to a school's development. In hindsight, having these sub-committees in place may have supported the dispersion of the tasks.

A governance structure is essential in any school, with clear roles and responsibilities, as described by McCormick et al. (2006). The governance documents written by the board clearly outlined the objectives, rules, and processes to make decisions, as well as a formal structure that included a chairperson, vice-chair, secretary, treasurer and seven members, as well as their responsibilities and duties. Furthermore, the board is involved in "decisions and actions linked to defining an organisation's mission, establishing organisational culture and structures that facilitate accomplishment of the goals" (McCormick et al., 2006, p. 430). As Clarke (2017) stipulated, "the role of the board is one of setting the long-term future for the school and maintaining oversight (not management) of the school's operation" (p. 56). The school's operation resides with the principal once one has been appointed. All these considerations were accounted for within the board's constitution, in the early stage of development. As a location was found, a principal was appointed who took on the daily operation of the school. The board still has oversight of the school, and the main function of the board is one of consultation and advice (Caldwell, 2013).

Building a team

McCormick et al. (2006) emphasises that a board's ability to function consistently as one body in meeting its responsibilities is not without challenges. When board members represent their own or others' values, this may hinder the ability of the board to function (McCormick et al., 2006). To ensure multiple perspectives, the board should be composed of people with diverse experiences (DeKuyper, 2002). However, further frustration or conflict can arise when there is no consensus or there is ambiguity about their roles (McCormick et al., 2006). Having desirable attributes in areas of

organisation and management, and an ability to make decisions and willingness to commit to the undertaking of governing, are not likely to contribute to board effectiveness, unless the person is able to apply and share the expertise (McCormick et al., 2006). If members of the team are not working together, or displaying problematic behaviours, and even conflict, it is important to find ways to restructure the team (Kotter, 2012). This may require finding a process that will transition the person out of a team as these types of people are barriers to forming an organisation and it is beneficial for the organisation to have a well-functioning team. In reading the literature and reflecting on the various board members' ability to contribute at times during the school development, had I the benefit of this hindsight, I would have implemented a clear role and expectations for each individual in joining the board, as well as seeking ways to ease people out of the organisation using Kotter's assessment tools (Kotter, 2012), to ensure an effective team.

Recruiting expert help and advice

Two important areas within schools are financial and legal obligations. An accountant can undertake the financial planning, write a business plan, and help with advice for capital expenses into the future, and ensure the school remains viable. A lawyer can provide advice around contracts and leases, as well as ensuring policies comply with the various legislation. As Nicholas (2010) stated "establishing a new school requires enormous energy and expertise" (p. 88). Douglas utilized experts, such as an architect to help with building regulations, the chairperson was a management consultant, two lawyers, a teacher and a psychologist on the founding board, which "led to a highly skilled team of people, all volunteers, who were able to work in their areas of expertise to establish the school" (Douglas, 2012, p. 38). In hindsight, I would have an array of experts (e.g., accountant, lawyer, builder) on the board to ensure multiple perspectives are considered, as well as to receive advice in a timely manner.

Leadership and management

As a leader, at times it was not about making deliberate and informed choices; instead, I found myself complying to satisfy rules and regulations and making choices without the wisdom gained from experience. Without all the detailed information needed, it was difficult to have the confidence that I was making evidence-informed judgements. This type of bounded logic is referred to as incrementalism, otherwise known as “muddling through” (Guo & Augier, 2016). In setting up a school and searching through the requirements to be undertaken without any clear direction was at times problematic and absorbed valuable time and other resources. The initial working party, who were brought together by a common goal to establish a school, generated many different ideas, resulting in a course of action that ultimately satisfied the minimum requirements (Guo & Augier, 2016) to achieve the necessary provisions for gifted children. As the board muddled through the requirements, and as I reduced large tasks into smaller steps (or as Lindblom (1979) describes, incremental steps), this resulted in a rational response to solve individual problems, limiting the need for broader information in a context where information seemed unavailable. Starting a school is a complex problem, and trial and error was commonplace in our decision-making and efforts as we worked through the requirements.

Chapter 5. Discussion and Conclusion

Introduction

This study was a retrospective analysis of the experiences of a group who, together, established a new and independent school for gifted students. The aim of the study was to answer the question, "What is the interplay over time between a special interest group's values and aspirations and their compliance with the required government regulations to achieve the outcome of establishing a school for gifted children?" Kotter's change management theory was used to structure the narrative of the sequence of events and report the emerging themes of the findings. This chapter discusses the key findings that emerged from this study, the implications of the findings, the limitations of the study, recommendations for further research and conclusion.

Discussion of Key Findings

When establishing an innovative new school, this study identified that it was important to:

- Generate a shared and public vision, mission, and goals.
- Clarify and negotiate core school values.
- Establish functional and aligned school structures.
- Exercise deliberate leadership and management approaches.
- Be mindful of the composition of the Board of Management.
- Establish clear communication and decision-making systems.
- Be mindful of the tension between innovation and compliance.

These findings are discussed in the following subsections.

Generating a shared and public vision, mission, and goals

We found in coming together that our first imperative was to develop a shared vision. While this is supported by the literature (Collier,2017), our development of a vision was driven by a desire to bring people together for a shared purpose. We found that generating a foundation in shared values allowed the collective wisdom of the group to organically lead to the development of other

aspects required, such as the mission and goals for the school, enabling advancement of the project and ensuring the present school's continuing success. Generation of a vision fostered support and created an identity for the school in the wider community and also provided a structure for further decision making and focus. Other research focused on establishing a new school also found that having a vision, mission and goals established a guiding direction for development (Collier, 2001; Douglas, 2012; Nicholas, 2008).

Developing a vision for the future was a process that also aligned with Kotter's change model (Kotter, 2012), and, unknown to the group at the time, the task of developing a vision, mission, and goals not only captured the basis for the formation of a design for the school but also met some of the initial requirements to gain registration to establish that school.

Clarifying and negotiating core school values

This study identified that clarifying and negotiating core school values when establishing a school is central to ongoing collaboration within the group.

At the initial stage of forming the school, there were no established values held by the founding group upon which to base decision-making processes or direction. Recognising this, the managing group started by sharing their own values, and these informed the establishment of core values for the school. van Niekerk and Botha (2017) indicates that successful schools have a collective value system in place that strengthens the positive functioning of the school. The establishment of core values not only invigorated the group, but provided foundational pillars to articulate the shared beliefs of the school and, in doing so, enabled ordinary people the opportunity to accomplish extraordinary results (Gurley et al., 2015), namely creating a school for gifted children. Articulation of shared values had a motivating impact on the group's persistence and their shared commitment and enabled them to begin to address the extensive and detailed requirements for registering a school.

Although the group collaboratively shared their own values to form the core school values, at times other personal values and beliefs would surface that did not resonate with other members. These competing values occasionally hindered the process and progress of decision making and required several meetings to ensure all people had a voice before a consensus could be reached. Findings of Legget et al. (2016) supported the observation that board meetings became an ongoing site of negotiation that could impact on the effectiveness of the board to govern, and in which processes "moderate the relation between context and board effectiveness" (McCormick et al., 2006, p. 438). Board members who were interviewed in this research identified the impact of individual values of members of the initiating group and shared their frustrations, questioning why some members remained on the board, implying that, while some members worked very hard, others were there for reasons of personal advantage. In a case study of ten schools (Leggett et al., 2016), a similar issue was noted, and it was concluded that one of the challenges of school governance is when members abrogate their responsibilities. McCormick et al. (2006) argued that it is important that required standards for board members should be clearly stated. Uncooperative, non-contributing board members became a hindrance to progress when the enormity of the workload became apparent in the final stages of the project, raising questions regarding why such individuals should remain part of the team.

This study found that the selection of team members needs to be deliberate, with consideration of the range of expertise that will be required in the process: mere enthusiasm for the outcome is not enough. Although values empower and motivate people to take action, Kotter (2007) emphasised that people who are not contributing or are complacent need to be removed, otherwise the organisation can run the risk of failing. Kotter (2012) highlighted the importance of effective team players, as well as the removal of those who are barriers.

Establishing school structures

This study found that, as the initial group continued to review its understanding of school establishment, three important structures became necessary for the new school to function. The first was a governance structure or framework; the second was a "day to day" operational school structure, mostly focussing on student groupings and learning; and the third was the development of the structure or phases. These structures also needed to align with the vision and values, which were fundamental to the success of the unique intentions of the school.

These structures are outlined in the following subsections.

Governance structure

After the establishment of a board, the findings revealed there was very little understanding of how to create a governing framework. It is important to note that experts are required during the development of a school in order to provide advice and support. In this instance, the group required expertise to write a constitution which outlined how the board would function. The *Education Act* and Education Registration Board required a school to be a Body Incorporated with a constitution that provided the framework on which to operate.

Within a constitution, specific roles, responsibilities, and objectives are defined. This enables the board to make decisions, allocate power, establish a culture, and achieve its organisational vision and goals. Kotter (2007) argued that people who are willing to give emotional commitment and work as a guiding coalition will achieve change. Since independent schools are self-governed (McCormick, 2006), without oversight by any central authority, a clear governing framework is required.

School structure

A significant amount of board time was devoted to designing a school structure that would be appropriate for a school for gifted children and would align with the core values and vision the board had developed. Some members of the board had very traditional views regarding school structure based on their experience of schools, yet they knew that the structure would need to be different to reflect the unique intent of the school.

Over time, the structure changed from a design based on mainstream year-level grouping of students to one based on grouping students by ability, providing acceleration by subject, and allowing each student to work at their own pace. The literature on ability grouping and subject acceleration for gifted students is well established in several countries. Ability grouping students and allowing subject acceleration leads to more than simply academic benefits, with increased self-concept, self-awareness, and social benefits from being with cognitive peers (Coleman & Cross, 2006; Gross & Smith, 2021; Steenbergen-Hu et al., 2016; VanTassel-Baska et al., 2021). Using theoretical foundations based on research within the field of gifted education provided a strong foundation on which the school could build.

The findings showed the board chose deliberately to require teachers to have the specific knowledge and appropriate pedagogies to support gifted students to thrive within the school environment. This decision is supported by research literature (Kronborg & Cornejo-Araya, 2018; Plunkett & Kronborg, 2019; Rowley, 2008) which emphasizes that specialised training in gifted education is essential to foster particular skill development. When undertaking a similar venture in developing a school with a specific focus, care is needed in who is employed and precision is necessary in determining the unique qualifications required to work within the school environment. Appointing the right staff is critical to the success of the school (Collier, 2017).

A finding that initially challenged the group was a description of year levels: this was required for registration, but did not align with the ability grouping designed by the board for the education

of gifted students. The board discussed its concerns with educational authorities and a compromise was found to enable compliance: student records will indicate a base grade (age equivalent), even though their abilities and classes are at a higher level. By being aware of the requirements for registration and asking questions of the registering authority, it was possible for the board to resolve this important challenge. This approach is an important consideration for any future school board.

Developmental structure

Four distinct phases of development were discovered during this retrospective analysis: foundation, development, establishment, and operation. The phases had distinctive characteristics and a sequential predictable pattern that, if known in advance, would have provided milestones and motivation for success. Kotter (2012) referred to these steps as short-term wins, inspiring people to continue to build to the next step. These phases have only been identified in this retrospective analysis of the process as a whole and may have provided some greater structure and confidence in the work of the board had they been known beforehand. As this finding is significant to the intent of this study, to ensure coverage of all specific areas for compliance, it is recommended that any person establishing a new school use these phases as milestones and detail each step with specific tasks, as emphasised in the new Education Standards Boards (SA) guidelines (2017).

Leadership and management

Issues of leadership and management are recognised as important when establishing a school. Studies undertaken to date see leadership as a key element in school establishment (Collier, 2001; Nicholas, 2008). This study found that establishment of a new school required deliberateness in establishing a leadership approach and management responsibilities. The board had to ensure there was clear accountability and viability of the institution and needed to appoint a leader who would ensure the values and goals of the school were not compromised by external factors and that decisions would be made in support of the vision and values of the board. No matter how dedicated and collaborative the group was, there was still a need for a leader to bring people together, create

trust and open communication. Kotter (2007) stated that without strong leadership to drive change, an organisation will not change, and the venture will fail.

Berber's (2009) study reported that principals have many roles and responsibilities in the establishment phase. As the founding board chair and, later, as Principal, I found myself in multiple roles as a leader: setting the direction, organising, monitoring, building relationships, and modelling the values of the school. As the leader, I also found myself as manager: I problem-solved, managed, and provided momentum for the school's development. Collier (2001) highlighted that leadership is crucial during the establishment phase of the school.

As the leader, I considered myself to be a gatekeeper between internal and external elements. I was responsible to ensure the efficiency of operational issues, addressing challenges uncovered within the regulations by discussing them at the board meetings, and by encouraging the engagement of others, input, and a sense of ownership. Open and inclusive communication provided a solid basis for making decisions (Nicholas, 2008), although some decisions needed considerable thought at times to conform to the education regulations.

Leadership and management are important but distinctive aspects in school design, and I found that the roles of leadership and management overlapped during the school's development. To succeed, a combination of both is recommended (Lunenburg, 2013), although the values of the school must continue to underlie the direction, decisions, and operations undertaken, as noted within the findings and also described by Collier (2001) as an important element. Curiously, while leadership and management are important as part of an overarching structure in the day-to-day operation of a school, there is no mention within the Education Standards board of requirements in this area: it is just assumed that it will be a consideration. A clear leadership/management structure is recommended within any new school structure, with a detailed outline of the responsibilities and

roles, as well as specific times to meet to discuss the operational running of the school. Identifying this gap in the regulations is a significant finding of this research.

Composition of board of management

In retrospect, it became clear that consideration of the composition of the planning group and the diversity of knowledge, skillsets, and dispositions among board members was important. The findings in this study demonstrate the importance of a cooperative and collaborative team of people who possess a range of specialised knowledge, skills, dispositions, and who could recruit specialist help as necessary. Kotter (2012) supported this claim that having the right people in the group is paramount to success.

Experts are essential when starting a school, as financial, property, and marketing expertise and advice are essential to interpret what the requirements imply and to provide support for transforming them into outcomes as required. We found having a lawyer on the initial group in the early days extremely useful. The findings of this study identified that we lacked financial expertise to address the financial viability of the school. We were also challenged in navigating the building codes to understand what makes a building compliant or fit for use. Another area in which we had little understanding was marketing, to provide information to stakeholders as to who we were and the intent of the school. The problems experienced by the initial group and subsequent board may have been averted by recruiting experts and by forming focused sub-committees or working groups that attended to one particular task, such as identification and selection of a property, selecting and developing a curriculum, and developing a marketing strategy, as discussed in Douglas's (2012) study.

Within the requirements to register a school, information or guidance regarding the composition of the board membership was not required when we applied. All that was required was a comprehensive set of policies and procedures that provided adequate supervision and protection for the safety of the students. Our interpretation was to ensure we wrote a child protection policy that required all volunteers, including board members, to obtain a police clearance, to protect the children and the organisation. There were changes to the requirements for registration in 2017, such that a school is now required to be established by individuals who are "fit and proper [people]"

and have the skills and experience to effectively govern a school. Since undertaking this retrospective analysis, it is recommended that prospective members be required to complete a nomination form that details their knowledge, qualifications, and experience, as a means to ensure the board has representation of a variety of skills to effectively govern the school.

Communication and decision making

As the findings have demonstrated, the group communicated its vision, mission, and goals to the wider community through a variety of media (such as Facebook, a website, and newsletters). Kotter (2007) argued that it is essential to use "every possible channel" (p. 100) to achieve success, and this was a guiding principle used to ensure all concerned would understand the direction of the organisation. Kotter (2012) adds that communication within the team is also an important element, and this was reflected in the way the board tackled problems in a democratic manner. According to Kotter (2007) communication is words but, more importantly, occurs in deeds. It was found within this study, the vision for the school was communicated through the actions of the members who continually persevered to obtain the intended outcome. It is recommended that Principals and governing boards communicate a new school's intention to the broader community, as this is of paramount importance to ensure the success of the school.

As a leader, I communicated the ethos and identity to outside stakeholders as I was establishing the credibility of the school. Ethos and identity are both reported as critical elements in a new school (Collier, 2001; Nicholas, 2008). Participants identified me as a leader who held a clear vision for the school and someone who could communicate a persuasive story to other members of the team as well as the wider community (Lunenburg, 2013). Being tenacious by nature, but not clear on the regulations in the earlier years, I often muddled through decisions to seek answers to questions that had been posed. "Muddling through", as a decision making paradigm, requires individuals to be focused on the important issues at hand and make progress incrementally

to achieve the result (Daly et al., 2013). It is recommended that a new leader consider their approach to leadership by drawing upon the extant literature on the distinctive nature of educational leadership to understand that clear communication, transparency, and clear decision-making processes will ensure success.

Tension between innovation and compliance

A critical aspect of this study is the acknowledgment that the goal was singular: namely, to establish a Reception-to-Year-12 school for gifted students in Australia. There were specific design characteristics that had to be considered to accommodate and cater to the social and academic needs of gifted children. These specific design characteristics included a curriculum with specifically embedded interventions, such as ability grouping, acceleration by subject, and problem-based and independent learning. To accommodate acceleration within subjects, the school was designed to have each subject taught at all levels concurrently by suitably qualified teachers. The teachers were expected to use a student-centred approach to individualise student learning and incorporate social and emotional requirements on a day-to-day basis to nurture students. A whole-school approach was located within the literature and supported these design characteristics (Mullen & Jung, 2019). The participants perceived the current traditional way of organising and delivering education may not work for many gifted children. However, far from preventing the design of an innovative school with a specialist focus, the regulations supported us in this endeavour. The regulations outlined key aspects of what needed to be undertaken, and the findings of this retrospective analysis demonstrate that the school developed these key aspects in incremental stages from Founding to Operational. During each phase, specialist expertise and knowledge was needed and obtained to continue to comply with what was required to register a school.

It is of concern that, thirty years ago, Evans and Lake (1988) identified that principals were under pressure, trapped between innovation and the traditions of the current educational system.

Indeed, innovative schools tend to revert to traditional settings (Nicholas, 2008) despite the educational reforms over the past 40 years. It is recommended therefore that Boards carefully consider their skill sets, be prepared to recruit experts in areas that are lacking, and set up sub-committees (as required) to cover property, curriculum, marketing, regulations and finances.

Implications of the Research

The literature available on establishment of new independent special focus schools is limited. Prior information about the development of a school during the formation stage can provide guidance and confidence about development activities for new or modified educational facilities (Mulford, 2004).

This research adds new knowledge and insights for future similar undertakings. The history of this organisation highlights challenges, issues, and specific features that organisations, governing boards, and educational leaders can use to inform their own practices in starting a school. In doing so, this study lays the groundwork for future research into the interplay between school design and education regulations.

Limitations of the Study

The qualitative interpretive approach of this study provided an opportunity to explore in-depth the challenge of designing and establishing an independent school for gifted students. There were, however, some limitations.

The study was limited to a focus on the establishment of one school in one state, South Australia. In other states and territories, regulations and governing school authorities may have different requirements for funding, staffing, school size and curriculum. These results are transferable to other schools in other states and territories and will depend on the context of a particular school.

The sample size was small and limited to one board, and the possibility of a bias is high due to the insider role I had, which may limit the generalisability of the research findings. As the auto-ethnographer, I also had an understanding of the social context being investigated and the people involved. This position also enabled me to gain an appreciation of the detailed nature of the work that was required and the challenges in establishing a school. As the auto-ethnographer, I was in a unique position to interpret diversity among the responses during the rich picture interviews, enabling me to ask more in-depth questions. Cross-referencing interview responses, document analysis and my journal in a systematic manner increased the rigor and reliability of information collected. I was also aware that the values and aspirations of the group contain an overall inherent bias because they shared a commitment to the provision of a school for gifted children. However, this research study provided sufficient insights into the processes in establishing a school to enable readers to make connections and to perceive implications for their own context.

Undertaking a retrospective analysis separated me from the data and the experience for a period of time and enabled me to be more objective in reviewing my own experiences. Choosing to include a critical friend in the analysis was an asset to balance against the potential biases I would bring to the analysis, as they provided a less biased, expert viewpoint (Ainscow & Southworth, 1996). In our conversations, they undertook a role that challenged my thinking and clarified experiences in constructing knowledge.

Despite these limitations, there is some generalisability of the study findings that will have salience to others interested in engaging in a similar process, although the particular educational focus may be different.

Recommendations for Future Research

During the course of writing this thesis, it became apparent that there is still more to be learned about the periods before and after opening a new, independent, specialist school. Areas of interest that might be considered for specific research include questions around governance, leadership, school design and compliance:

- Can innovative, special interest schools have an impact on the wider educational system?
- Are independent special interest schools able to maintain their unique mission over time?
- How might the regulations be enhanced to better support the establishment of a new school?

Conclusion

Setting up a school is not for the faint-hearted, as it is an enormous and complex undertaking. The purpose of this research was to identify the interaction between a group's values and aspirations and the regulations for establishing a school. Based on retrospective analysis and reflection, it can be concluded that the regulations were challenging initially, yet over time the group became familiar with the documents and regulations were rarely seen as an impediment to enacting the school's vision. Overall, the core values and aspirations of the group to start a specialist interest school were *facilitated* by regulations.

Having a clear vision and core values that were easy to communicate was integral to providing a foundational framework for the school. Embedding these within governance and school design ensured establishment of school structures that reflected and supported the required specialist teaching. Leadership needed to be focused and able to delegate specific responsibilities to others. At times, the leader took on other roles to maintain the impetus for motivation in times of challenge. It was found that, as the school developed, the diversity of the group needed to be considered, and that there were times when experts were required.

The knowledge generated in this thesis will have application beyond the context of this research and beyond those involved. It is hoped that the research will provide people in leadership, school design, those working to develop educational regulations and policy makers with insight into the interplay that occurs.

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Appendix 1. Approval Documents

This appendix contains approval documents for this study. Note that Lynda McInnes is the married name of Lynda Simons.

Ethics Approval

From: Human Research Ethics
Sent: Thursday, 29 June 2017 11:07 AM
To: Lynda Simons; Jane Jarvis; John Halsey
Subject: 7448 SBREC Final approval notice (29 June 2017)

Importance: High

Dear Lynda,

The Chair of the Social and Behavioural Research Ethics Committee (SBREC) at Flinders University considered your response to conditional approval out of session and your project has now been granted final ethics approval. This means that you now have approval to commence your research. Your ethics final approval notice can be found below.

FINAL APPROVAL NOTICE

Project No.:	**7448**
Project Title:	Establishing a School for Gifted Children: The interplay between the goals and values of the Governing Board and the Government Regulations
Principal Researcher:	Mrs Lynda Simons
Email:	lynda.simons@flinders.edu.au
Approval Date:	29 June 2017
Ethics Approval Expiry Date:	**31 May 2019**

The above proposed project has been **approved** on the basis of the information contained in the application, its attachments and the information subsequently provided.

RESPONSIBILITIES OF RESEARCHERS AND SUPERVISORS

1. **Participant Documentation**
   Please note that it is the responsibility of researchers and supervisors, in the case of student projects, to ensure that:
   - all participant documents are checked for spelling, grammatical, numbering and formatting errors. The Committee does not accept any responsibility for the above mentioned errors.
   - the Flinders University logo is included on all participant documentation (e.g., letters of Introduction, information Sheets, consent forms, debriefing information and questionnaires – with the exception of purchased research tools) and the current Flinders University letterhead is included in the header of all letters of introduction. The Flinders University international logo/letterhead should be used and documentation should contain international dialling codes for all telephone and fax numbers listed for all research to be conducted overseas.

1

Figure 3. Ethics approval email - page 1

- the SBREC contact details, listed below, are included in the footer of all letters of introduction and information sheets.

This research project has been approved by the Flinders University Social and Behavioural Research Ethics Committee (Project Number 'INSERT PROJECT No. here following approval'). For more information regarding ethical approval of the project the Executive Officer of the Committee can be contacted by telephone on 8201 3116, by fax on 8201 2035 or by email human.researchethics@flinders.edu.au.

2. Annual Progress / Final Reports

In order to comply with the monitoring requirements of the *National Statement on Ethical Conduct in Human Research (March 2007)* an annual progress report must be submitted each year on the **29 June** (approval anniversary date) for the duration of the ethics approval using the report template available from the Managing Your Ethics Approval SBREC web page. *Please retain this notice for reference when completing annual progress or final reports.*

If the project is completed *before* ethics approval has expired please ensure a final report is submitted immediately. If ethics approval for your project expires please submit either (1) a final report; or (2) an extension of time request and an annual report.

Student Projects

The SBREC recommends that current ethics approval is maintained until a student's thesis has been submitted, reviewed and approved. This is to protect the student in the event that reviewers recommend some changes that may include the collection of additional participant data.

Your first report is due on **29 June 2018** or on completion of the project, whichever is the earliest.

3. Modifications to Project

Modifications to the project must not proceed until approval has been obtained from the Ethics Committee. Such proposed changes / modifications include:

- change of project title;
- change to research team (e.g., additions, removals, principal researcher or supervisor change);
- changes to research objectives;
- changes to research protocol;
- changes to participant recruitment methods;
- changes / additions to source(s) of participants;
- changes of procedures used to seek informed consent;
- changes to reimbursements provided to participants;
- changes / additions to information and/or documentation to be provided to potential participants;
- changes to research tools (e.g., questionnaire, interview questions, focus group questions);
- extensions of time.

To notify the Committee of any proposed modifications to the project please complete and submit the *Modification Request Form* which is available from the Managing Your Ethics Approval SBREC web page. Download the form from the website every time a new modification request is submitted to ensure that the most recent form is used. Please note that extension of time requests should be submitted prior to the Ethics Approval Expiry Date listed on this notice.

Change of Contact Details

Please ensure that you notify the Committee if either your mailing or email address changes to ensure that correspondence relating to this project can be sent to you. A modification request is not required to change your contact details.

4. Adverse Events and/or Complaints

Researchers should advise the Executive Officer of the Ethics Committee on 08 8201-3116 or human.researchethics@flinders.edu.au immediately if:

- any complaints regarding the research are received;
- a serious or unexpected adverse event occurs that effects participants;

Figure 4 Ethics approval email - page 2

- an unforeseen event occurs that may affect the ethical acceptability of the project.

Kind regards
Rae

Mrs Andrea Fiegert and Ms Rae Tyler
Ethics Officers and Executive Officer, Social and Behavioural Research Ethics Committee
Andrea - Telephone: +61 8 8201-3116 | Monday, Tuesday and Wednesday
Rae – Telephone: +61 8 8201-7938 | Tuesday, Thursday and Friday

Email: human.researchethics@flinders.edu.au
Web: Social and Behavioural Research Ethics Committee (SBREC)

Manager, Research Ethics and Integrity – Dr Peter Wigley
Telephone: +61 8 8201-5466 | email: peter.wigley@flinders.edu.au
Research Services Office | Union Building Basement
Flinders University
Sturt Road, Bedford Park | South Australia | 5042
GPO Box 2100 | Adelaide SA 5001

Figure 5 Ethics approval email - page 3

Introduction Letter

Flinders UNIVERSITY

Dr Jane Jarvis
School of Education
GPO Box 2100
Adelaide SA 5001
Tel. +61 8201 3798
Fax + 16 8 201 3184
Jane.jarvis@fliders.edu.au
www.flinders.edu.au
CRICOS Provider No. 00114A

Date 21/8/2017

LETTER OF INTRODUCTION

Dear Sir/Madam

This letter is to introduce Lynda Simons who is a Doctoral student in the School of Education at Flinders University. She will produce her student card, which carries a photograph, as proof of identity.

She is undertaking research leading to the production of a thesis or other publications on Establishing a School for Gifted Children: The interplay between the goals and values of the Governing Board and the Government Regulations.

She would like to invite you to assist with this project by agreeing to be observed at Board meetings and taking part in an interview which covers certain aspects of this topic. No more than one hour on one occasion would be required.

Be assured that any information provided will be treated in the strictest confidence and none of the participants will be individually identifiable in the resulting thesis, report or other publications. You are, of course, entirely free to discontinue your participation at any time or to decline to answer particular questions.

Since she intends to make a tape recording of the interview, she will seek your consent, on the attached form, to record the interview, to use the recording or a transcription in preparing the thesis, report or other publications, on condition that your name or identity is not revealed, and to make the recording available to other researchers on the same conditions (or that the recording will not be made available to any other person). It may be necessary to make the recording available to secretarial assistants (or a transcription service) for transcription, in which case you may be assured that such persons will be asked to sign a confidentiality agreement which outlines the requirement that your name or identity not be revealed and that the confidentiality of the material is respected and maintained.

Any enquiries you may have concerning this project should be directed to me at the address given above or by telephone on 82013798 or e-mail jane.jarvis@flinders.edu.au

Thank you for your attention and assistance.

Yours sincerely

Dr Jane Jarvis

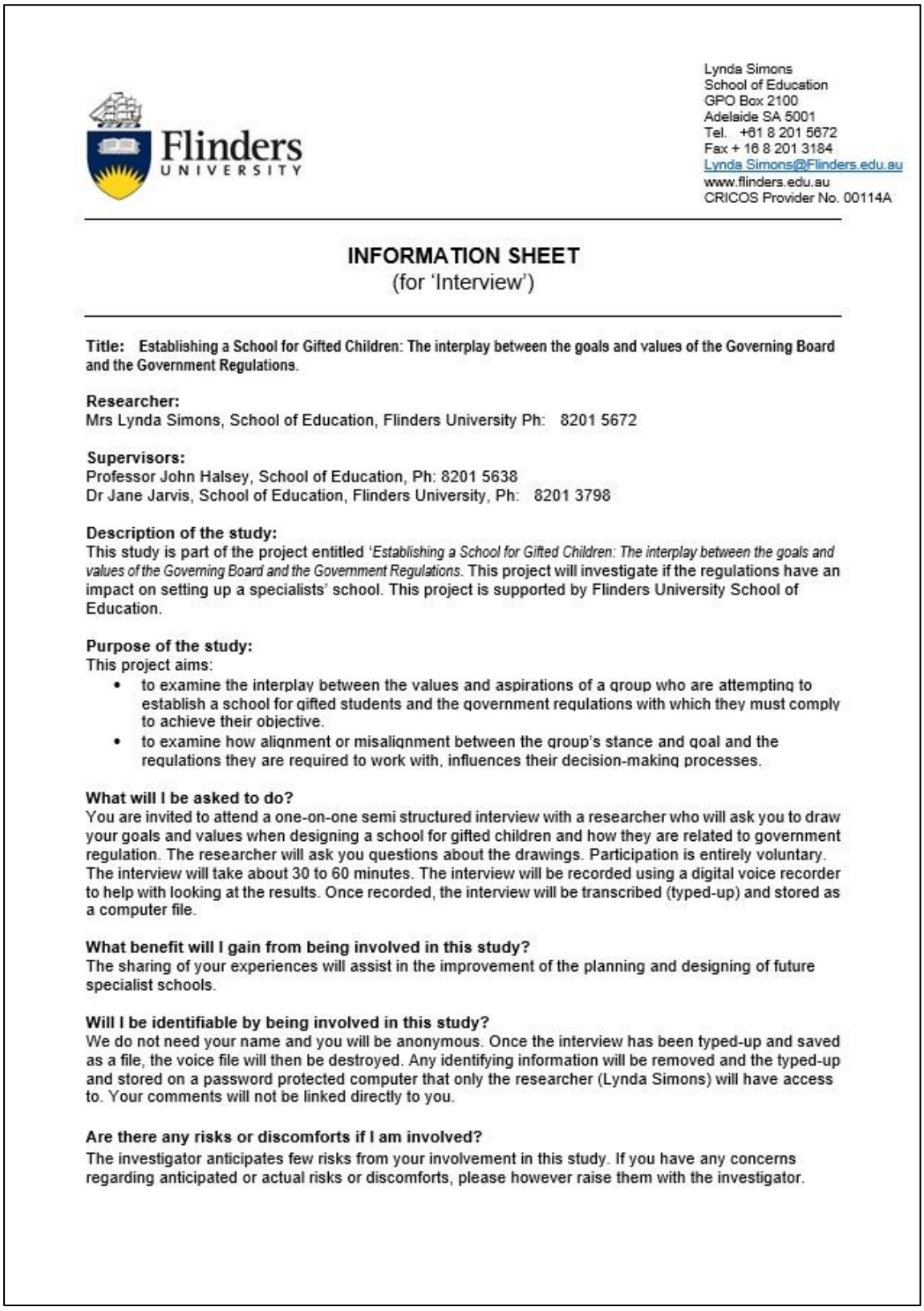
Senior Lecturer in Education

School of Education

This research project has been approved by the Flinders University Social and Behavioural Research Ethics Committee (Project number 7448). For more information regarding ethical approval of the project the Executive Officer of the Committee can be contacted by telephone on 8201 3116, by fax on 8201 2035 or by email human.researchethics@flinders.edu.au

Figure 6. Introductory letter

Information Sheet



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INFORMATION SHEET
(for 'Interview')

Title: **Establishing a School for Gifted Children: The interplay between the goals and values of the Governing Board and the Government Regulations.**

Researcher:
Mrs Lynda Simons, School of Education, Flinders University Ph: 8201 5672

Supervisors:
Professor John Halsey, School of Education, Ph: 8201 5638
Dr Jane Jarvis, School of Education, Flinders University, Ph: 8201 3798

Description of the study:
This study is part of the project entitled '*Establishing a School for Gifted Children: The interplay between the goals and values of the Governing Board and the Government Regulations*. This project will investigate if the regulations have an impact on setting up a specialists' school. This project is supported by Flinders University School of Education.

Purpose of the study:
This project aims:

- to examine the interplay between the values and aspirations of a group who are attempting to establish a school for gifted students and the government regulations with which they must comply to achieve their objective.
- to examine how alignment or misalignment between the group's stance and goal and the regulations they are required to work with, influences their decision-making processes.

What will I be asked to do?
You are invited to attend a one-on-one semi structured interview with a researcher who will ask you to draw your goals and values when designing a school for gifted children and how they are related to government regulation. The researcher will ask you questions about the drawings. Participation is entirely voluntary. The interview will take about 30 to 60 minutes. The interview will be recorded using a digital voice recorder to help with looking at the results. Once recorded, the interview will be transcribed (typed-up) and stored as a computer file.

What benefit will I gain from being involved in this study?
The sharing of your experiences will assist in the improvement of the planning and designing of future specialist schools.

Will I be identifiable by being involved in this study?
We do not need your name and you will be anonymous. Once the interview has been typed-up and saved as a file, the voice file will then be destroyed. Any identifying information will be removed and the typed-up and stored on a password protected computer that only the researcher (Lynda Simons) will have access to. Your comments will not be linked directly to you.

Are there any risks or discomforts if I am involved?
The investigator anticipates few risks from your involvement in this study. If you have any concerns regarding anticipated or actual risks or discomforts, please however raise them with the investigator.

Figure 7. Information sheet - page 1

How do I agree to participate?
Participation is voluntary. You may answer 'no comment' or refuse to answer any questions and you are free to withdraw from the interview at any time without effect or consequences. A consent form accompanies this information sheet. If you agree to participate please read and sign the form and send it back to me via email.

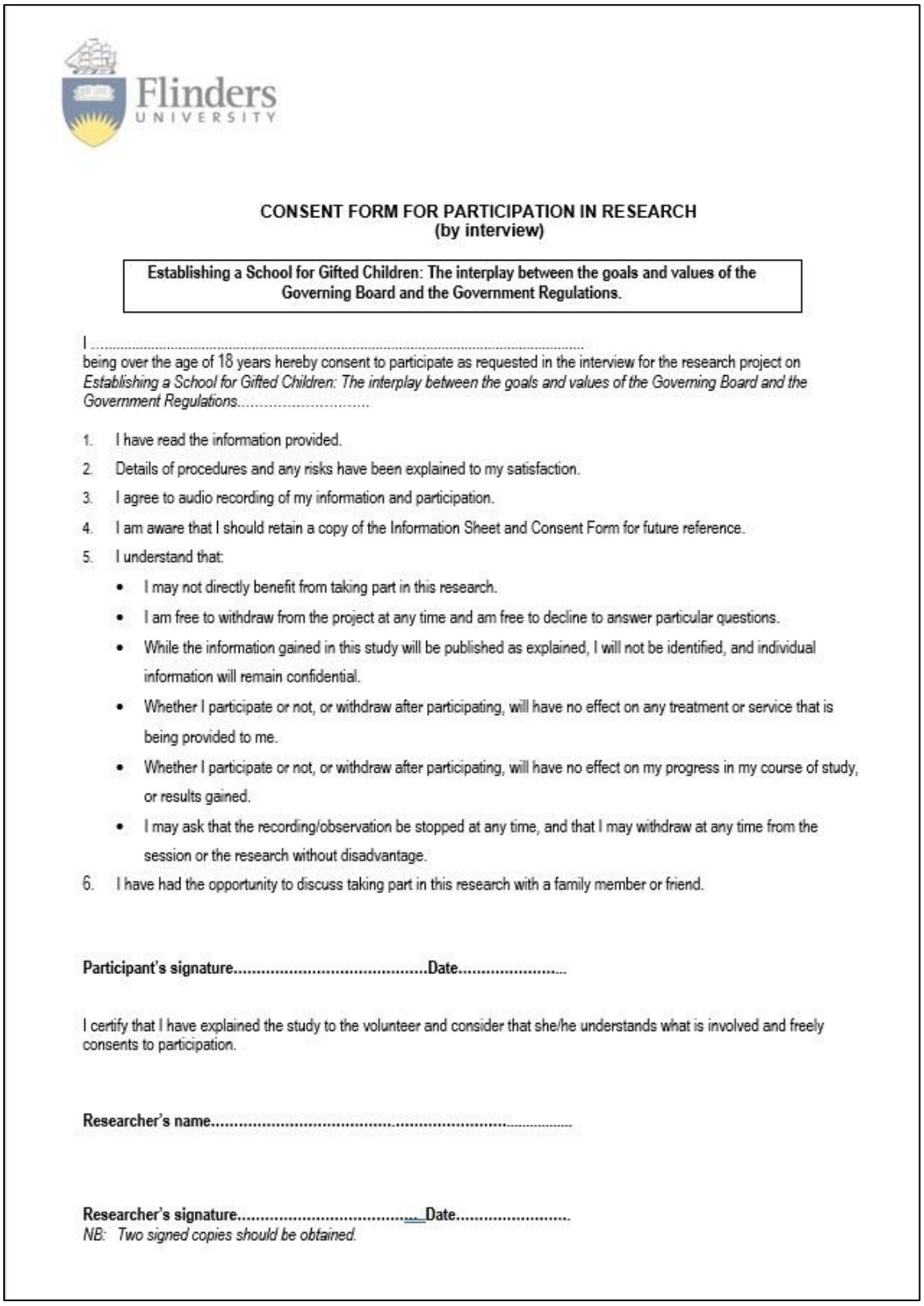
How will I receive feedback?
On project completion outcomes of the project will be given to all participants via email.

Thank you for taking the time to read this information sheet and we hope that you will accept our invitation to be involved.

This research project has been approved by the Flinders University Social and Behavioural Research Ethics Committee (Project number 7448). For more information regarding ethical approval of the project the Executive Officer of the Committee can be contacted by telephone on 8201 3116, by fax on 8201 2035 or by email human.researchethics@flinders.edu.au

Figure 8. Information sheet - page 2

Consent Form



Flinders UNIVERSITY

CONSENT FORM FOR PARTICIPATION IN RESEARCH
(by interview)

Establishing a School for Gifted Children: The interplay between the goals and values of the Governing Board and the Government Regulations.

I .....
being over the age of 18 years hereby consent to participate as requested in the interview for the research project on *Establishing a School for Gifted Children: The interplay between the goals and values of the Governing Board and the Government Regulations*.....

1. I have read the information provided.
2. Details of procedures and any risks have been explained to my satisfaction.
3. I agree to audio recording of my information and participation.
4. I am aware that I should retain a copy of the Information Sheet and Consent Form for future reference.
5. I understand that:
   - I may not directly benefit from taking part in this research.
   - I am free to withdraw from the project at any time and am free to decline to answer particular questions.
   - While the information gained in this study will be published as explained, I will not be identified, and individual information will remain confidential.
   - Whether I participate or not, or withdraw after participating, will have no effect on any treatment or service that is being provided to me.
   - Whether I participate or not, or withdraw after participating, will have no effect on my progress in my course of study, or results gained.
   - I may ask that the recording/observation be stopped at any time, and that I may withdraw at any time from the session or the research without disadvantage.
6. I have had the opportunity to discuss taking part in this research with a family member or friend.

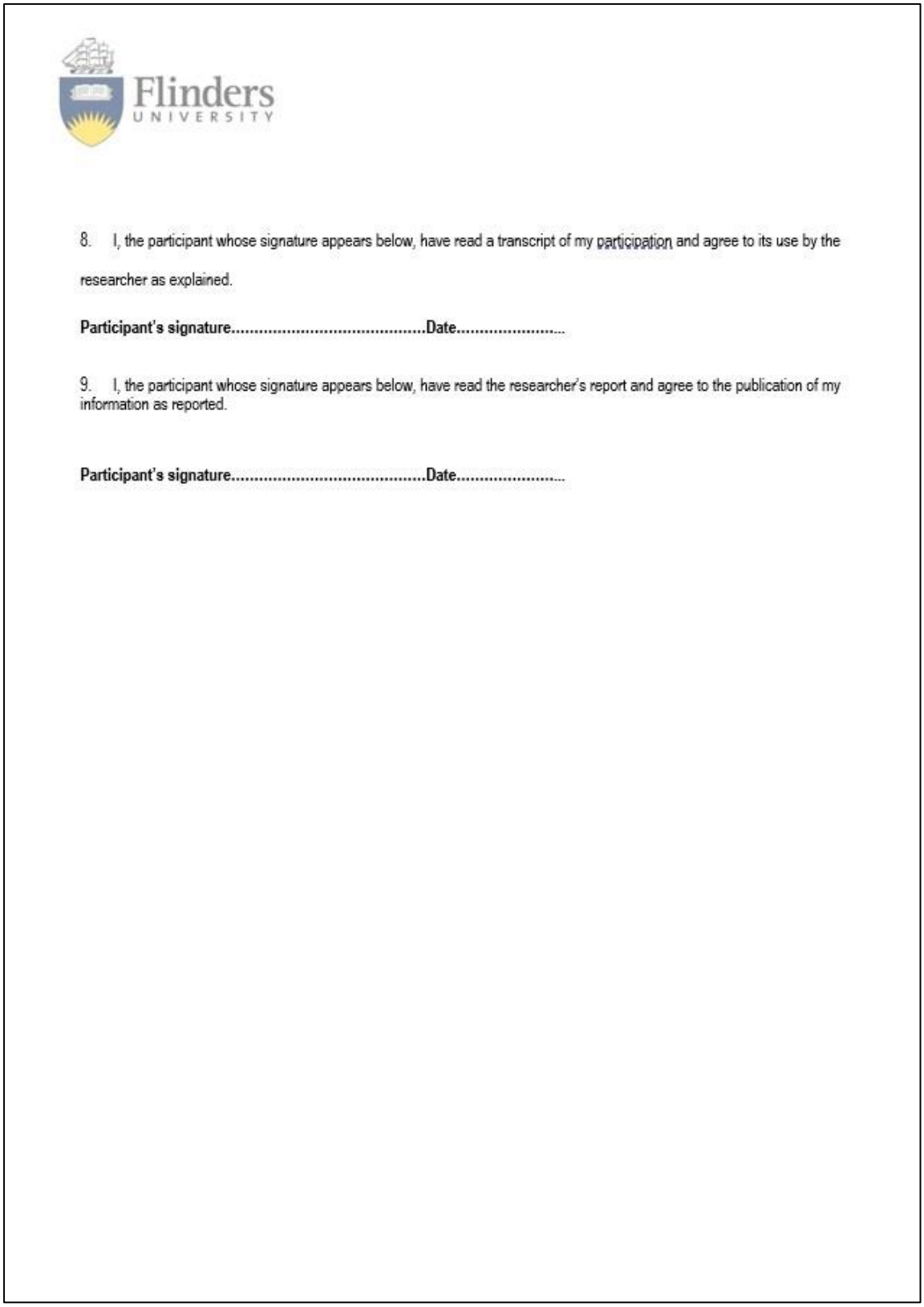
Participant's signature.....Date.....

I certify that I have explained the study to the volunteer and consider that she/he understands what is involved and freely consents to participation.

Researcher's name.....

Researcher's signature.....Date.....
NB: Two signed copies should be obtained.

Figure 9. Consent form - page 1


Flinders UNIVERSITY

8. I, the participant whose signature appears below, have read a transcript of my participation and agree to its use by the researcher as explained.

Participant's signature.....Date.....

9. I, the participant whose signature appears below, have read the researcher's report and agree to the publication of my information as reported.

Participant's signature.....Date.....

Figure 10. Consent form - page 2

Appendix 2. Rich Pictures

This appendix contains rich pictures drawn by those interviewed (see Chapter 3). As previously noted, participant names are pseudonyms.

Figure 11. Rich picture from participant RP1 (Sally)

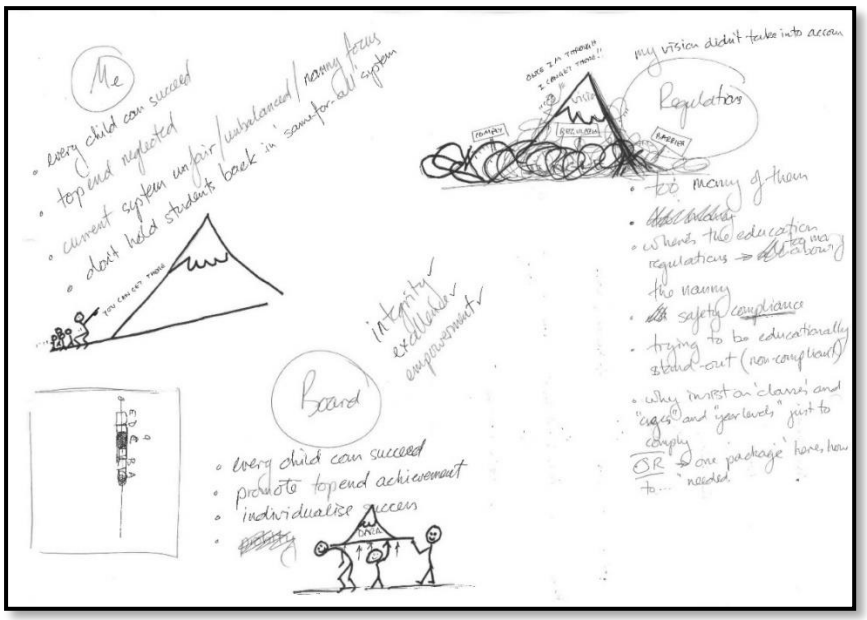


Figure 12. Rich picture from participant RP2 (Nigel)

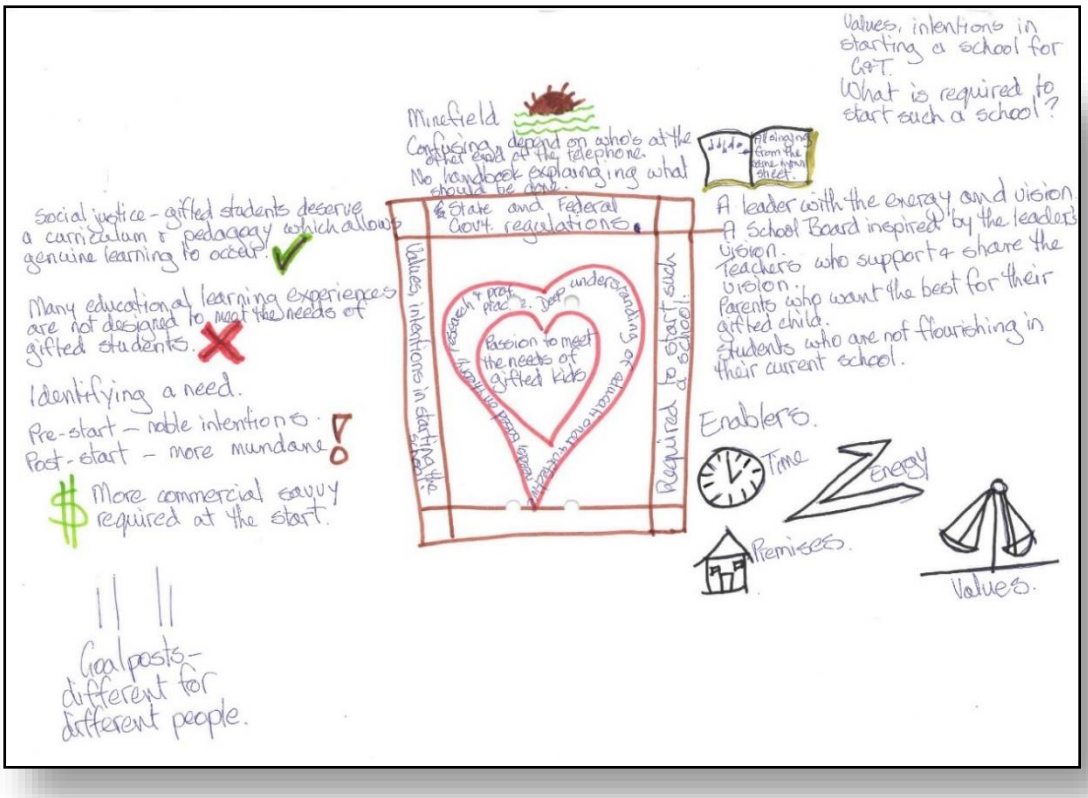


Figure 13. Rich picture from participant RP3 (Wilma)

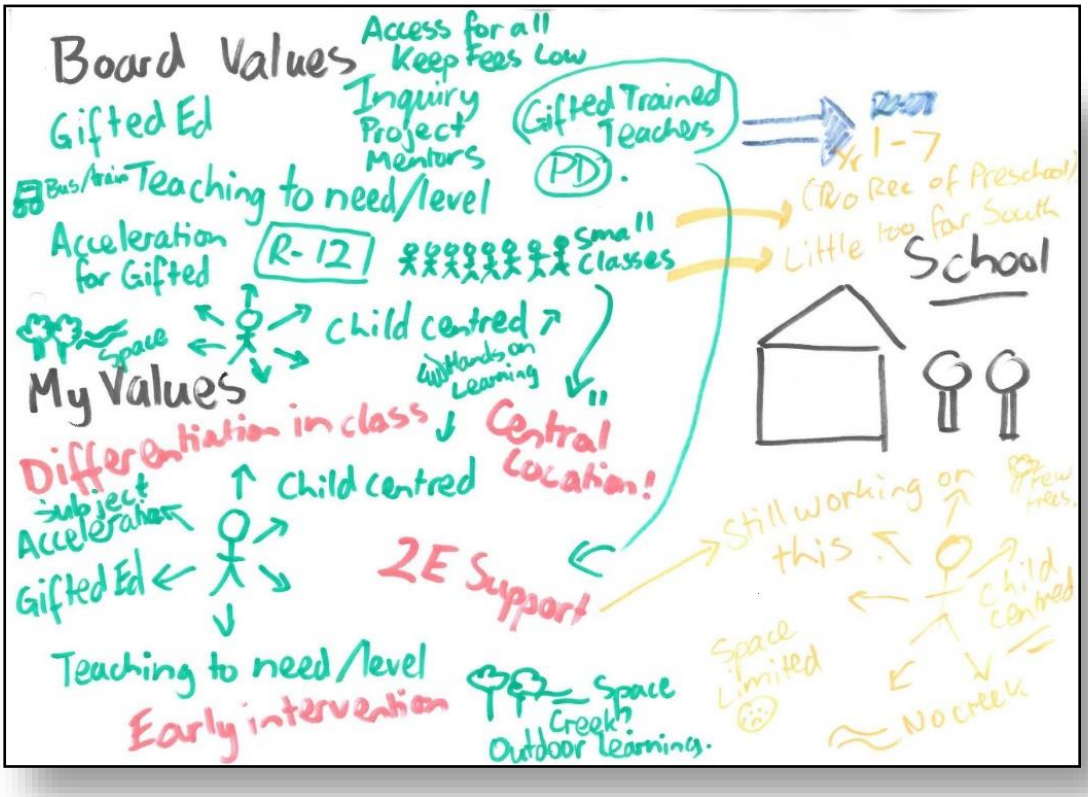


Figure 14. Rich picture from participant RP4 (Anita)

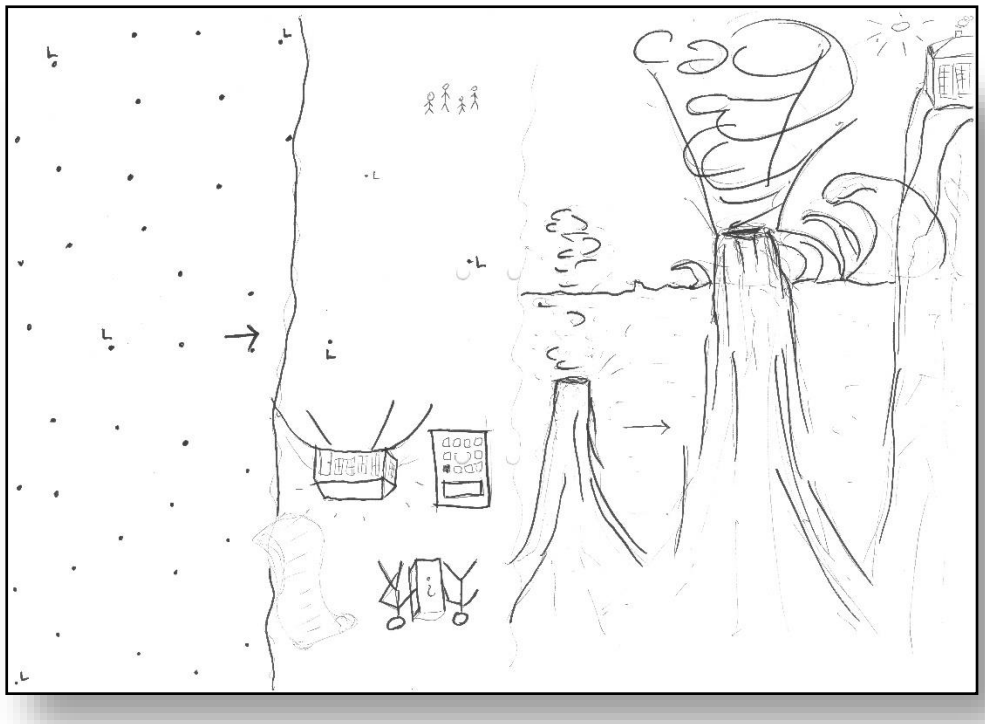


Figure 15. Rich picture from participant RP5 (Martin)

Appendix 3. Places Considered for a School

Table 13

The following table lists places considered for a new school.

Year	Suburb	Description	Feasibility and cost benefits
February 2014	Glenside	Old church school	Property for sale did not want to lease
May 2015	Edwardstown	Old school owned by a church	Shared space, owners decide not to lease
January 2016	Clapham	Old school	Not approached.
June 2016	Goodwood	Community hall Very small, very little parking	Not ideal, no further action was taken
	Mitcham	Community hall Able to share space, use of the library, close to transport	Unfortunately, change of management and leased to another organisation
	Mitcham	Old football club	Whilst we could have a school by day, they still wanted to use twice a week in the evening. Packing up the furniture and keep items safe could be an issue
June 2016	Pasadena	High school Area for rent located upstairs, no playground, yet has a large oval	Difficult to judge cost, concerns about children climbing the stairs
	Unley	School that was closing the doors	Original they wished to sell. We were not in a position. Overtime the local council bought the site. The council offered the site for rent. Unfortunately, we did not have the high rent available
July 2016	Panorama	Convention centre	Owners decided to bigger a risk to lease
	Mitcham	Old school, currently being used as a library, no grass area, and no fences	Shared space, child protection an issue

Year	Suburb	Description	Feasibility and cost benefits
	Tonsley park	Current research and university precinct	We did not fit the research criteria
	Pasadena	Old TAFE site	For sale and out of our price range
	Cumberland Park	An old church, very tiny, one room, no toilets	Would not get approved
September 2016	Edwardstown	An old church with a large hall and house	Currently approved by the council as a school On closer review, it was for evening classes 4 pm to 9 pm Considerable work, time, and money to change the times
October 2016	Park Holme	Public primary	Complied with all rules And happy to lease a space

Appendix 4. Regulation and Funding

The appendix contains notes on regulation and funding in South Australian schools that are relevant to this study.

Regulation

In South Australia, the organisation that manages registration and monitoring of all schools is the Education and Early Childhood Services Registration and Standards Board of South Australia (EECSRSB). At the time of this study, the EECSRSB had a registrar that governed Government schools, early childhood, and non-Government Schools, with each of these overseen by a registrar. Government schools and early childhood education were required to follow the guidelines and regulations of the *Education Act 1972.*

The non-Government schools registrar worked with the Office of Non-Government Schools Board whose primary function was to oversee planning, and proposals that ensured the following:

- Nature and content of instruction offered, or to be offered, at the school is satisfactory.
- School provides adequate protection for the safety, health, and welfare of its students.

Compliance with the first of these criteria requires applicants to:

- Articulate and provide an educational philosophy and curriculum policy, including the curriculum framework.
- Describe the pedagogical approach.
- Identify resources for students.
- Provide an overview of assessment and reporting.
- Describe how the opportunity to complete the South Australian Certificate of Education will be offered to students.

Compliance with the second criterion required assurance of adequate provision for the safety, wellbeing, and welfare of students, which included compliance with zoning for educational usage at the local and state level, as well as an enrolment development plan and staffing allocation for five years. Non-government schools operated under *Education (Registration of Non-Government Schools) Regulations 1998*, which was overarched by the South Australian *Education Act 1972*.

Significant changes occurred in South Australia's education system from 2012 to 2017. On 31 December 2011, the *Education (Registration of Non-Government Schools) Regulations 1998* were revoked and replaced by a new *Education and Early Childhood Services (Registration and Standards) Act 2011* (referred henceforth as *the Act*). The Objects and Principles (Part 5, Section 9) of *the Act* were to form the Strategic Plan of the Education and Early Childhood Services Registration and Standards Board of South Australia. The scope of *the Act* was to ensure registration is now required for all schools under the objects of *the Act*, to include:

…providing for the regulation of the provision of education and early childhood services in a manner that maintains high standards of competence and conduct by providers and—

(a) recognises that all children should have access to high quality education and early childhood facilities and services that—

i. addresses their developmental needs; and

ii. maximise their learning and development potential through an appropriate curriculum; and

iii. support their educational achievement; and

iv. promote enthusiasm for learning; and

v. support, promote and contribute to their health, safety, and well-being; and

(b) provides for a diverse range of services; and

(c) recognises the rights of parents to access a diverse range of education and early childhood services providers; and

(d) enhances public confidence in the operation of education and early childhood services providers.

In 2013, a consultation process occurred on the registration of schools in South Australia relating to the three overarching areas of the *Education and Early Childhood Services (Registration and Standards) Act 2011*, being:

- Nature and content of instruction offered, or to be offered, at the school is satisfactory.
- School provides adequate protection for the safety, health, and welfare of its students.
- School satisfies any other requirements set out in the regulations.

All existing schools (both government and non-government) were registered under one body, the previous system was made redundant, and a single registrar was appointed in June 2016. The newly formed Education Standards Board would establish a registration and regulatory system to further support the registration of new schools and review ongoing school registration. The full force of these regulations was not implemented until July 2017 with the object of *the Act* being to regulate the provision of education. A review of registration is required at least once every five years to confirm that schools are operating within the legislative requirements and to provide on-going endorsement of a school to enrol full fee-paying overseas students.

The new South Australian Standards consisted of three specific criteria:

- School Governance: the school is accountable for its safe, legal, and financially viable operation, and that it has corporate governance arrangements in place to lead this.

- Student Learning and Assessment: the school has curricula, teaching and performance policies, and practices, and staffing in place to effectively deliver education services for each stage of schooling and monitors its educational achievements.
- Student Safety, Health, and Welfare: the school provides a safe, healthy, and supportive learning environment that protects the well-being of students.

As a consequence of these changes, 2011 through 2017 was a turbulent time, as the restructuring of the Education Standards Board and the alignment of the new standards took time to address all of the aspects of the act. Consultation with stakeholders and working with the "machinery" of government can be a slow process and may have caused some degree of confusion for schools submitting applications during this time.

Funding

In Australia, educational provision is mainly the responsibility of the states and territories and there are considerable differences amongst the Australian states in the requirements mandated by each government Education Department regarding their processes for the establishment of a school (Collier, 2001). In addition, the "Federal government has some influence on education by providing financial support to all non-government schools, developing nationwide policies and distributing grants to offset regional disadvantage" (Mohajeran & Ghaleei, 2008). The amount of the government grant received each year is largely determined by the number of students enrolled (Mohajeran & Ghaleei, 2008). How the money is allocated is largely overseen by the school's principal and business manager (Mohajeran & Ghaleei, 2008).

With regard to Federal funding, the Australian Education Act (2013) is the principal legislation for the provision of Australian Government funding to government and non-government schools. The Act sets out the funding arrangements, including recurrent, capital,

and special circumstances. The act also sets out the expectations for approved authorities to ensure funding accountability and the conditions that are required in order to receive funding. The basic requirements for approved authorities are summarized below. An approved authority must:

- Possess a body corporate (for non-government schools) (Section 75(2) of *the Act*).
- Be not for profit (Section 75(3) of *the Act* and regulation 26).
- Be financially viable (Section 75(4) of *the Act* and regulation 27).
- Meet the "fit-and-proper person" requirement (Section 75(5) of *the Act* and regulation 28).
- Have appropriate state or territory school registration (Section 75(7) of *the Act*).

Approved authorities also have six ongoing policy requirements that must be adhered to for federal funding to be approved:

- Professional development Regulation 77 (2) (a).
- Implementation Of A Recognised Curriculum by ACARA Regulation 42(1).
- Participation in The National Assessment Program Section 77 (2) (c).
- Development of a school improvement plan Regulation 77(2)(d)(ii).
- Compliance with relevant disability discrimination laws Regulation 77 (2) (e).
- Provision of information regarding:
    - School census (Regulations 46-51, and regulation 37).
    - National data collection (Regulations 52-58).
    - Student reports to parents and carers (Regulation 59) other information about the school made available to the public (Regulation 60).

For a school to apply for funding, an application is made through the Schools Entry Point. The application can only be submitted on the first day the school becomes operational. The funding for a new school commences in July of that year.

Provision of state funding is subject to a decision by the relevant State Minister, after receiving advice from the Office of Government Schools and Services (ONGSS) (2015, p.1).

Applicants who require state funding are required to submit a proposal and assessed using the provisions of the Non-Government Schools Planning Policy (2015).

Appendix 5. Timeline

Table 14

The following table shows a timeline of significant dates in the creation of the new school.

Date	Focus	Research		
April-May 2013	Idea of the school	Diary	Reflective Journal	Document analysis
June-September 2013	Raising awareness			
8 October 2013	First official meeting of management committee			
5 November 2013	Name for the school			
3 December 2013	First vision and mission statement			
18 February 2014	Constitution written			
18 March 2014	Dara Village School Inc application submitted Dara Village Facebook started			
15 April 2014	First Board meeting			
25 April 2014	Notice of intent to start a school submitted			
29 April 2014	Certificate of Incorporation received			
20 May 2014	Friends of Dara Group Facebook page started			
2 May 2014	Australian Business name			
9 April 2014	Tax file Number obtained			
14 July 2014	Not for profit status obtained from ACNC			
21 October 2014	Formalized a link with GTCASA /First Annual General Meeting			
January 2015	Meeting with EECRSB register a school pending a building			
28 April 2015	Insurance for the board considered			
20 September 2015	Submission of Registration to EECRSB			
10 November 2015	Second Annual General Meeting			
January 2016	Definition of Giftedness used Wages and conditions for staff			
2 May 2016	Notice of intent submitted			
21 June 2016	First Principal appointed			
13 September 2016	Liability Insurance for board completed HR policy completed/JPs completed			
18 October 2016	Third Annual General meeting			

Date	Focus	Research		
27 October 16	ESB meeting			
9 November 2016	Lease signed at local primary school			
21 November 2016	ESB Registration of the school		Reflective Journal	
22 November 2016	Uniform and logo finalised			
13 December 2016	Cole accounting found for financial expert			
23 January 2017	Application for state Funding			
28 January 2017	Doors opened Application for Federal Funding			
4 April 2017	Fourth Annual General Meeting			
September 2017			Rich Picture Interview	
October 2017				
November 2017				
May 2018	Constitution updated			
7 May 2018	Validation review of School Registration			
27 April 2020	ESB approval to move and to go to year 12			
28 April 2020	Doors opened at new site			