

FOCUS

Explore the impact that the Investments in Excellence (IIE) programme has on developing successful schools in the UK.

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ACKNOWLEDGEMENTS:

I would like to thank the Ministry of Education for selecting me for this sabbatical. The Newfield Park School Board of Trustees is also thanked for granting me leave. A special thank you to the head teachers and staff of the schools visited; New Bewerley Community School, Rosebank Primary School, Oldham and Wolverhampton Colleges, in addition to Mancat (now The Manchester College), the University of Wolverhampton, Education Leeds and the facilitators of Oldham, Leeds and Manchester STEP's community projects – they were all open and helpful. As well I need to thank Sonya and Jane for keeping Newfield Park School firing while I was away from school during the period of my sabbatical. A final thanks goes to the team at The Pacific Institute, Eamonn, Desire, Jane and Neil for hosting me during a very busy time for them.

EXECUTIVE SUMMARY

I am Principal of Newfield Park School a U5, decile 2 school in the south east of Invercargill City. Newfield Park School is a new school that was created out of the 2004 Ministry of Education Network Review during which time a number of schools were closed and merged entities were established. Newfield Park resulted from the merger of Newfield and Rockdale Park Schools, opening in February 2005.

Prior to being appointed into this position I was Principal of Manaia View School in South Whangarei, a decile 1 school that also resulted from the merger of two schools. In the years preceding these two positions I have held principal positions in four other schools from a two teacher rural to a twelve teacher in a provincial city.

Without a doubt it has been a varied, interesting and sometimes challenging time, especially managing the changes inherent in school mergers. When considering an area for the sabbatical due consideration was given to the lessons learned and the tools that were captured to help the transitions involved.

In both schools the Investments in Excellence Programme (IIE) has been facilitated with staff, the last two have included a large number of staff from a local financial institution (The Southland Credit Union), which has since gone on to merge with all of the other Credit Unions in the South Island (New Zealand Credit Union South), The chief executive has used IIE to facilitate the merger and along with me and two other members of his staff has completed the IIE Facilitators course. He and I have since co-facilitated a course for six people.

Mr Ian Richards (Director The Pacific Institute New Zealand), Leanne Elliot (communications The Pacific Institute London) and Eamonn Cullinan (The Pacific

Institute London) assisted a great deal in identifying and contacting school and community organisations (*refer appendix 1*) willing to facilitate a visit and as a result letters of invitation were received.

During the time leading up to the actual visit there was a small break down in the communication with the schools and organisations that invitations had been received from, this was resolved prior to the actual trip by Eamonn, who spent a great deal of time and effort re-establishing contact and preparing a realistic and worthwhile timetable. During this period one principal had been appointed as a head teacher in a merged school and it was felt that this could impact heavily upon his time commitments (he did use IIE to help during the process). In addition to this one of the community agencies closed after funding was cut and the facilitator left.

Just prior to embarking on the trip a decision was taken to make contact with the Sabbatical Board with the intention of informing them of these difficulties, advice was received that it would be appropriate to keep the board informed of any changes that may occur to the project. However with contact re-established and the channels of communication reopened I felt that there was every possibility of using the visits to interview those involved and prepare a report relevant to the topic. In addition to this, a powerful programme, Steps To Excellence for Personal Success (**STEPS**), was included into the scope of the project. This is a shortened version of IIE, designed and presented by The Pacific Institute (**TPI**) so that parents and supports staff can be inducted. In most of the facilities that I visited this programme and a 16 – 19 year old programme called Breakthrough To Excellence (**BTE**), were an integral part of developing students and getting buy-in from school parents. At this stage there appeared to be some evidence that these programmes had resulted in improved rates of attendance and re-engagement in mainstream education.

A house was organised just outside Oldham, for the duration of the visit, this gave relatively ready access to the schools and projects that were situated in the cities of Leeds, Oldham, Manchester and Wolverhampton through the readily available public transport.

An important component of any sabbatical leave is the element of “refreshment” and this was specifically planned within the scope of the project and associated commitments.

The main benefits of my project will be for me to use the information gained in order to move Newfield Park School into its next phase of development and to be able to share this experience with other school principals, and the broader Invercargill community.

A bi-product of this work was a greater understanding about the power of the STEP’s programme in refreshing a community, especially when thinking about the community of Invercargill.

As part of an agreement with all those worked with in the UK, this report was scrutinised and approved prior to publication.

THE PROJECT

The Pacific Institute (*TPI*) produce a range of tools which they claim improve the personal effectiveness of individuals and leaders as well as improve organisational and community culture. For education, these tools include class-based materials and courses for students plus adult programmes appropriate for school leaders, teachers and parents. In other countries (particular the United Kingdom) these are used in schools to develop self-image, raise expectations and improve performance in all areas. The ideas are used as both a school improvement tool and for community regeneration. Claims regarding impact do appear to be supported by evidence from independent sources. For example;

- *‘Psychological wellbeing was significantly improved in the group that had participated in Breakthrough to Excellence (BTE). [16 to 19 year olds]. This indicator relates to the sense of wellbeing or self-worth, the basis of aspiration and indicators of the likelihood of personal success’*

Institute of Psychiatry, Kings College, London

- *‘An independent study amongst long-term unemployed demonstrated participants in TPI’s programmes were 2½ times as likely to be in employment three months later when compared to those who had not attended’*
- *‘It is no exaggeration to state that Investment in Excellence (IIE) would empower and inspire teachers, and unleash a raft of untapped talent and potential which could only benefit schools, communities and their pupils’*

President, National Association of Head Teachers

Reports from early courses in New Zealand also seem to support positive claims and, having done the IIE programme myself, I have found a marked improvement in my ability to lead my school and facilitate the changes required in schools today. However, it is still early to assess the longer-term impact of the IIE programme here or make judgements regarding effective approaches to maintaining sustainability. This evidence is crucial if we are to adopt this programme as a school improvement tool.

With this in mind I took the opportunity to visit schools and tertiary providers to gain data that allowed me to confirm that, with the right background and support, significant changes made in school practice at all levels as a result of the IIE programme can be realistically sustained over a two year period. The UK offered an ideal opportunity to conduct this research as they have been using the programmes for a number of years.

This sabbatical allowed me the opportunity to visit schools and community programmes that have been operating successfully over time. During my visit I was given the opportunity to talk with head teachers, significant teaching staff and caregivers.

I travelled to the UK during the July vacation period in 2008 and based myself just outside Oldham, which, significantly, is a local Authority that has been extremely proactive in this area, with the STEPS programme operating, and as stated previously,

My project broadened into linking the programmes offered by TPI and measuring their effects.

THE PROGRAMMES OFFERED

1. **Investments in Excellence (IIE)** engages individuals professionally and personally, giving a new perspective to both their jobs and their lives. The programme equips participants with a set of tools to develop their thinking skills and qualities as individuals and team members. Facilitated seminars are combined with periods of self- evaluation and supported by engaging interactive learning materials. In organisations, we build strong internal capacity in individuals and teams to use the Investment In Excellence tools to confront key issues in an ongoing, measurable way.*
2. **Steps to Excellence for Personal Success (STEPS)**, for individuals, STEPS is an opportunity to take a fresh look at their lives. The programme helps them to see how much they are truly capable of achieving and offers the skills to make it happen. STEPS provides a simple set of tools to move individuals through a self-reinforcing spiral of building a positive identity and effecting the improvements they wish to make in their lives. STEPS has been implemented with success in a variety of settings and has been particularly effective in; helping long-term unemployed people develop the motivation and self-belief to complete other training and find jobs□- equipping parents with better parenting skills□- enabling those being made redundant to develop a new future for themselves□- use in prisons to reduce recidivism, and aid re-assimilation in the community.*
3. **Breakthrough To Excellence (BTE soon to be replaced by PX2)** provides a powerful toolkit, which enables young people to deal with the issues they are facing. It helps them to see that they have choices that they can take more control of their lives and that they can develop the thinking skills they need to become self-motivated, lifelong learners. Breakthrough is being successfully used in communities to move disaffected youths back into society, in schools and colleges to improve results and progressions, in Entry to Employment initiatives and by training providers to keep learners more focused on their goals. Breakthrough enhances other training provision because evaluations of the programme have shown that Breakthrough participants are more likely to go on to further or higher education, and to finish their course of study once begun.*
4. **Go For It and Think Smart** are programmes that have been deigned following the above templates but targeted to younger students. Think Smart is aimed at the 11 – 13 age group while Go For It is targeted at 14 - 16.
5. The final available products are aimed at the primary aged students, **It Starts with Me and It's Up to Me**.

All of these product are under regular review, and while there is extensive course materials (including DVD's) for facilitators and students, many facilitators tend to develop their own slant on what they deliver, I am aware of some facilitators who use the DVD's very sparingly and others who not use them at all.

* These descriptions have been taken directly from the TPI website.

This allows for individuality but does require quality control and some form of moderation. The student programmes build on each other and can only be delivered by trained facilitators.

METHODOLOGY:

Leading up to my actual trip to the United Kingdom I compiled a comprehensive questionnaire (*refer Appendix 2*) that was forwarded to the contact people in each of the institutions that had issued an invitation, the response was rather poor (two responses) but the information gained has been incorporated into the report.

In order to gain the most information over the short amount of time that was available in the very busy schedules of all those who had made themselves available I concentrated on gaining anecdotal data by interviewing each person and recording the conversations. I indicated to them that the tapes were not available for an audience but rather to allow me to revisit our conversations. In addition to the interviews a visit and tour of each facility was arranged and on one occasion I was able to talk in depth with two support staff and were trained STEP's facilitators who were also members of the local community and had had children attend that particular school.

It was a real bonus that one school had undergone what could have been a difficult merger in recent years and IIE had been a part of that merger.

I had the privilege of spending a valuable afternoon with the staff member from Education Leeds, Mr Chris Bennett, who was the driving passion behind the success of this programme in the wider Leeds area.

During the interviews the interviewees were given free reign to speak, make their own evaluative comments and share the "special stories" and very importantly their evaluations and "next step" scenarios.

After each visit I went through the notes, reviewed the tapes and looked for commonalities and just as importantly the differences in experiences and beliefs, it soon became quite obvious that there were a group of powerful similarities but also a small number of interesting differences and the beliefs linked to them.

With being based in a relatively central position I had the opportunity to have further, unplanned, contact with staff members of three of the facilities that had been generous enough to host me. During each of these visits I was able to explore other projects that they were involved with, two of these in particular had a direct links to the STEPs programme and the facilitation of support for students at risk. I found that these additional contacts reinforced some of the ideas that I had been exploring about the possibility of a community initiative to support at risk students in Invercargill.

As a conclusion to the 'project aspect' of my trip I enjoyed two full days with the TPI management team in London, this gave me a great insight into the philosophy and structure behind the company that brought their programmes to life. During this visit I had the rather unexpected opportunity of viewing the promo DVD for an exciting revision of the youth programme BTE, the revision is appropriately titled PX2. It is interactive and will appeal to young the people that it is aimed at. The founder of the company, Lou Tice, has openly announced his aim of reaching 200 million young people in 10 years. Prior to my visit to TPI I had talked to two members of the senior management at Wolverhampton College who had attended the launch in Seattle and

spoke very enthusiastically about the programme. The team at TPI are currently looking carefully at how the resources can be made more attainable for the target age group in the UK.

RESULTS

Throughout all of the time that I spent with the professionals working with these programmes I heard nothing but positives about the huge impact participation in the programmes had on the students and adults who complete the respective courses. There was no question whatsoever that the quality of the programme was extremely important and to this end it is a plus for The Pacific Institute in the UK that they are totally committed to developing extensive and ongoing processes to manage and improve the quality of the qualified facilitators at all levels, this is something that I referred to earlier in my report. This is evidenced by a staff member at TPI in London developing and overseeing quality control measures.

The overall theme of my project changed somewhat when it became obvious, for a number of reasons, that the use in primary school was limited and that the programme was not being delivered to student bodies as a whole, instead STEPS trained personnel (predominantly learning support staff) were delivering the early years programmes (It Starts with Me and It's Up to Me) to students identified by staff and withdrawn for this purpose rather than the "this is what happens here" that was obvious in the colleges that I visited.

At Oldham College, Mancat (now renamed as The Manchester College) and Wolverhampton College there was an absolute commitment by senior management and ruling boards that the programmes became integral to what they do. In fact it was originally initiated in all campuses by a committed member of the senior management and all members of this group, along with the boards, participated in the programme before requiring the remaining staff to participate. They are committed to all staff participating in IIE and/or STEPS, and the BTE programme is a part of every student's academic development. This was particularly evident at Mancat where it was a powerful tool.

This commitment to the three programmes; BTE, STEPS and IIE was very exciting as there is a major issue with teenagers becoming disengaged in education in the UK and this is replicated in many of the developed countries including New Zealand. This problem is growing and will soon be at a level where communities will find this impossible to manage. The colleges in the UK that I visited are successfully meeting this problem head on and are having a great deal of success, the programmes that I have described are important weapons in their armoury and they are well supported with other programmes, staffing and resources and, not least, substantial funding. A defining moment for me was to hear many staff members celebrating the fact that the biggest increase in the students enrolling at their college were achieving at Level 1, these are students who in the past would have certainly "fallen through the cracks", becoming totally disengaged and continuing the cycle of benefit dependency, domestic violence, poor health, teenage pregnancy etc. So often in the past I have heard the opposite where staff "celebrate" the fact that they have "got rid of so and so", "thank goodness he/she has gone to that school", "He/she was just like his older brother/sister."

An obvious outcome that could be expected of the re-engagement of students into education and the empowering of parents through participation in the STEPS

programme could be a decrease in truancy. Research in this area has been carried out in Leeds (*EVALUATION OF STEPS GROUP attendance strategy March 2008*). At this stage it is too early to quantify results but early data appears to show that there has been a measurable improvement in parent awareness and engagement. The intention now is to transfer that to families.

While visiting Mancat I was very privileged to have the opportunity to spend time observing aspects of their Alternative Education programme where students were making decisions about what they felt were important for them and their education, opting for learning experiences in literacy and numeracy rather than going on outside the classroom experiences like kayaking. We also celebrated with a group of young men who were busy constructing brick walls as part of a state funded pre apprenticeship programme. These young men, who had experienced little success in mainstream education, readily spoke to us knowledgeably about what they were doing and were able to confidently articulate the finer points of creating a brick wall.

IMPLICATIONS

Without a doubt the use of a programme such as IIE has been very powerful in helping the development of institutional cultures in the facilities that I visited. This will become even more important with the huge future changes for education in the UK as they look at developing and managing the new academies project (400 new academies by the year 2011) and the continuing process of rationalisation of schools.

With the youth difficulties that are being experienced in Invercargill and replicated nationally, it is imperative that the community looks very closely at the proactive programmes that are being implemented in the UK to support the young people and allowing them to take control of their lives. My experiences told me that TPI stable of programmes were being used to very good effect in the areas that I visited and it is important to note that of the communities that I visited, none of them could ever be described as easy, in fact they were and continue to be areas of extreme need.

A starting point in Invercargill could be for the BTE programme to become an integral part of what is offered at the Invercargill Secondary Student Network (ISSN), it has been used very successfully in raising the aspirations of students in the UK, and providing a platform for further engagement in education.

The difficulty I face at this stage is to analyse in my own mind the where, when and how of introducing these highly effective programmes so they can become so pivotal in the institutional culture of the organisations working with youth that they happen almost by default. It cannot be denied that a barrier for many educational and social communities will be the cost of the programme, both financially and in time. Maybe the Invercargill Licensing Trust and local Rotary Clubs could get in behind this, a precedent has been set for this by the rotary clubs in Auckland where sponsorship supports the participation of young people.

CONCLUSION

As explained earlier I have participated in the IIE training up to and including facilitator level. At Newfield Park School we are absolutely committed to developing the leaders of the future and have committed extensive funding to run programmes designed to achieve this with our year 5 and 6 students.

After making the contacts, being hosted by institutions and talking with key staff I am convinced that the programmes investigated have the ability, if introduced in the correct way, to make a real difference. Consequently it is my intention to now work closely with staff and the Newfield Park School Board of Trustees to introduce the programmes across the school at staff and student level as it is my conviction that it would give a common culture of quality learning in the school thus improving learning outcomes for student by improving teaching practice and commitment. A further planned outcome would be a measurable improvement in student attendance and also in the behaviours that would be observed at the school. All three of these indicators are measurable and have been incorporated into the schools Strategic Plan. With a shared culture “The Newfield Park Way” would be the basis of a culture that celebrates. I would also like to think that a natural development from this would be to grow the “big project” across the city of Invercargill

The Newfield Park School Board of Trustees is committed to providing the opportunity for all staff to participate in high quality professional development and this includes leaders. They hold a strong belief in the succession training within the staff.

On my return to Newfield Park School I will be making a full presentation to the Board and staff and making this report available to my fellow principals. In addition to this we will introduce the student programmes after facilitating, in partnership with a corporate, the IIE programme with all staff.

SPECIAL NOTE

The trip has been a unqualified success on a number of fronts; firstly being able to visit the wonderful educational facilities that the management and staff made so readily accessible; secondly the opportunity of talking to the students and sharing in their success and celebrations; thirdly and probably most importantly having a static base available to us throughout our time away. Having the cottage in Greenfield was pivotal to the success of my trip. The value of having a base to go ‘home to’ and somewhere to store our gear while we travelled around the schools etc was immeasurable and will continue to be a highlight for us both. We very much became a part of our village and participated in all of the many traditional festivals that abound in the UK, especially in Lancashire and Yorkshire where Greenfield was situated. This experience certainly provided the rest and refreshment component of my sabbatical leave.

REFERENCES

Much of the literature around the programmes that The Pacific Institute offer, is of a primary nature, by this I mean that it has not been published in a true sense, but rather is in the form of reports. I was able to access some of these as well as some wonderful individual “stories of success”. Throughout my examination of the literature it became obvious that while there is some statistical data, predominantly around the behaviours that needed to be changed, much of the evidence of culture change was very anecdotal.

1. EDUCATION LEEDS; The Families and Schools Together Team (FASTT)
2. JAMESON, Sally & PATERSON, Hedge; Evaluation of STEPS Group March 2008, EDUCATION LEEDS

3. OLDHAM CHILDREN'S FUND; STEPS To Success Programme Evaluation 2005 – 2006
4. HASWELL Jane, New Bewerley School, A Case Study (FASTT)
5. In addition to the above there were a number of media releases documenting the personal success of adult who had participated in the programmes. These provided anecdotal support of the success of the programmes

APPENDICES

1. Outline of facilities and contacts.
2. Written Questionnaire.

APPENDIX 1

FACILITY	CONTACT	DETAILS
Education Leeds	Chris Bennett	
New Bewerley Community School	Patrick Wilkin (head), Julie Herbert, Angela Lockwood.	STEPS, It's Up To Me
Rosebank Primary School	Gil Young	It's Up To Me
Oldham College	Pamela Cowen	IIE, STEP's, BTE
University of Wolverhampton	Sir Geoff Hampton, Jan Roman, Liz Dix	
Wolverhampton College	Ian Millard	
Mancat The Manchester College)	Rosie Croarkin & Neil Hansen	IIE, STEP's, BTE
The Pacific Institute	Eamonn Cullinan. Neil Straker, Desire' Nels	

APPENDIX 2



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INVESTMENT IN EXCELLENCE

1. How many years/months ago did you do the *IIE* programme?
2. Please describe your initial thoughts and impressions when completing the *IIE* programme.
3. What impact do you believe the *IIE* programme has had on you at a personal level?
3. Do you believe the *IIE* programme has had a positive impact on you in your professional role. If so, can you provide examples of this?

4. Roughly what percentage of your colleagues in school have done the *IIE* programme?

5. If a significant proportion of your colleagues have done *IIE* then do you believe this has impacted on the culture of the school? Can you provide examples?

6. Do you use the student programmes in the school? If so can you please indicate which ones you use and how you structure this.

7. We are particularly interested in the impact of *TPI*'s ideas on our students over time, with or without using the student programmes. Do you have any evidence of impact on students including behaviour indicators, measures of self-image, performance data, attendance records, etc?

8. Do you feel you have managed to sustain the ideas and process over time? If so, what do you believe the keys to this have been?