'THE CLUSTER TEAM'

A Model of Collaboration and Collegiality in
New Zealand Gifted and Talented Education

2003-2008

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Karen Bush

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ABSTRACT

This study investigated the evolution of a cluster concept involving primary schools that collaborated in a rural region of New Zealand to solve the problem of disadvantage for gifted and talented children. The principals formed a management committee to direct the implementation of a programme to ensure geographic isolation did not mean high ability children missed out on learning opportunities for the fulfilment of personal potential. As a collective provision, the cluster was an inaugural Talent Development Initiative and resourced by the Ministry of Education for six years from 2003–2008. One landmark feature was the partnership with an independent, rural education provider responsible for the facilitation and co-ordination. The literature revealed no evidence of similar provisions, so this paucity of research indicated the cluster management model was unique in Aotearoa-New Zealand.

The purpose of this case study was to gain an insight from the perceptions of the principals into the ways the cluster was managed; the effectiveness of the provision; and the central ethos. The methodology was based on a phenomenological approach. Data was generated through a focus group because this forum paralleled the decision-making mode of leadership. The key finding for this investigation was that the cluster was an applicable and effective mechanism to provide for gifted and talented students in New Zealand. This success as a TDI was premised on the core principles for the creed of the cluster. Passion and commitment were essential. Professional development was critical to grow a teacher knowledge base and improve outcomes for students. Good funding was crucial to enhance talent and enable sustainability. It was important to develop a special concept of giftedness befitting the values of the cluster community and reflecting a child-centred approach integral to the shared philosophy. A significant component was the external facilitation to co-ordinate the programme and to weld the group into a cluster team. The ethos at the centre was the extraordinary spirit of collegiality and camaraderie binding the cluster together. These findings from this study confirm the cluster as a model of best practice in the field of New Zealand gifted and talented education.

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I wish to sincerely thank and acknowledge with appreciation the following people. Without their support, encouragement, and belief in me, this thesis would never have been completed. My most heartfelt gratitude to:

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CHAPTER ONE

INTRODUCTION

1.1   Introduction

In a perfect gifted and talented world, there would be no need for a cluster. Instead, supporting gifted children in rural and regional New Zealand would be a priority for all schools. The diverse attributes of high ability students would be recognised and enhanced. Every school would have a rich stream of ready funding. There would be such ample evidence of a workable philosophy of giftedness embedded in their classrooms that a cluster would not have to be an option. Gifted students would consistently have their learning, social, emotional, cultural, and spiritual needs addressed. Acceleration and enrichment in a clearly differentiated curriculum would be the norm. There would be a plethora of high quality, innovative models of best practice. New knowledge would be generated, underpinned by a robust research base, and then this professional acumen would be shared within the field. Well informed, passionate teachers would always have in place exciting programmes to raise academic excellence and polish creative talents. A strong and caring system would nurture the specialness of giftedness. The promise of an inclusive education personalised to enhance the potential of all gifted and talented children would be realised. In an ideal world, a cluster would be superfluous to requirements. Unfortunately, this clearly has not been the reality for many schools in Aotearoa-New Zealand. There is a flaw in the utopian vision. It is more than a mere crack; it is a gap of inequity.

1.2   The research problem

However, because the world of gifted provision is far from perfect, the promise of a cluster comes to prominence as an answer to a New Zealand problem. The concept is offered as a local solution to a less-than-ideal situation. The cluster takes prime position as a strategy to bring a group of nine schools to join forces and work collaboratively. At the crux of the cluster is the mechanism of a management committee to solve the problem of inadequate provision. The cluster

therefore becomes an innovation to fill in the crevasses of gifted education's fragmented and disjointed picture (Riley, 2003).

Yet the desire to make a positive difference for gifted and talented children is accentuated by the geographical variable of isolation. The notion of rurality predominates because: "In New Zealand, rural means *rural*!" (Riley, 2003, p. 26) This inherent sense of displacement is perceived as disadvantage. Physical isolation acts as a barrier to be confronted in order to gain ready access to centralised urban services. As such, rurality is a disabler that has particular relevance to the ability to grow teacher capacity in the field of gifted education. Remoteness restricts participation in sound professional development and connection to effective practice models. This disadvantage is further compounded for small, country schools where low rolls proportionally translate to few gifted children. It can result in these students becoming physically, intellectually, and socially isolated from their like-ability peers. Dislocation means exceptional students in regional New Zealand may forfeit their right to a high quality education to enhance their special abilities. It is a negative paradigm for provision. To be rural and gifted can mean these children are placed at the margins of the pastoral support framework. On the periphery, they then miss out on rich learning opportunities and the fulfilment of personal potential. It is an obstacle for schools to overcome. Rurality exposes a void in our egalitarian ideology for addressing the needs of all gifted and talented children, regardless of where they live and go to school.

Hence, the issue of isolation is a primary factor sitting at the centre of the research problem. In response to ameliorating the problem of rural disparity, the cluster is a possible answer. It is a mode of provision to counteract this educational deficit. The cluster will be viewed as an agency of change to remedy the plight of the uneven and inequitable nature of education received by rurally gifted children (Riley, 2003). Collaboration is premised on the belief that working together would be more effective than operating as a single school. Hence, the thrust of this research inquiry is to find out if the cluster was a constructive strategy to out-manoeuvre the barrier of isolation. This case study will be conducted as a perception-based appraisal on the wherewithal of the cluster to provide for gifted

and talented students. The evaluation will be on the capability of the management mechanism group to implement a programme and respond to the needs of high ability children in rural New Zealand. Intrinsically, the focus on the joint way of working will unravel the core ingredients within the cluster.

1.3   Setting of the research

The scope of the research is confined to the cluster as a model for the implementation of a gifted and talented education provision. Importantly though, the cluster cannot be presented as a simple equation, but instead as a comprehensive and multifarious phenomenon. In conceptual terms, the cluster was a three-sided configuration. It was a confederation of interlocking schools, a method for managing, and a differentiated programme. The principals from the nine schools in the consortium formed a committee to oversee the project. Thus, the cluster was the blueprint created to support gifted and talented students in a rural region of New Zealand during the 2003 to 2008 timeframe. These school leaders were situated at the hub of the cluster. Most significantly for this thesis, the Management Group (latterly known as the Management Committee) [1] became a mechanism for the direction and supervision of the project. Arguably, the Management Group was the key component to the cluster practice and influential in determining the outcomes for students. The importance of this unit therefore explains the rationale for the researcher selecting only the management model for investigation.

From a historical perspective of the early 2000's, the schools in the emergent cluster era were catering for their academically bright students to varying degrees of effectiveness. During this period, the Government formulated a policy to prioritise gifted education and thus created a contestable funding pool open to proposals from all New Zealand schools and providers. The prospect of outside monies to better support exceptional students was a catalyst for establishing the cluster. The augmentation of this new scheme came under the auspices of the Ministry of Education's 'Talent Development Initiatives' (TDIs). The cluster of schools was successful in its application and became a Talent Development

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[1] *For the purposes of this thesis, the terms are interchangeable, although management group will be used as the generic term, while the principals often refer to their team as the Management Committee.*

Initiative for the 2003-2005 timespan. Moreover, the collaborative venture went on to be awarded a second round of funding from 2006-2008. However, it is essential to highlight a key point of relevance within the research framework. This case study is retrospective. The research is undertaken on a cluster project in the post-TDI era because the Government-funded programme concluded at the end of 2008. Thus, this thesis examines a past model of provision through the perceptions of the Management Group principals involved in the latter TDI phase. Although outside the time period for this study, special mention must be made of the endurance of the model. The original cluster still continues nine years later in 2011, albeit in a revised edition with the core six schools in an amalgam with a less formalised group of rural schools.

Critical to the cluster's identity, an outside constituent impacted on the operation style of the programme. Within the framework of the cluster was the inclusion of a rural service provider referred to as REINC.[2] A notable characteristic of REINC (Rural Education Incorporation) was its autonomy as an independent organisation, so that if functioned separately to the schools in the region. Historically, the institution worked in the region supporting lifelong learning for rural communities, and thus became the administrative partner in the collaborative relationship with the schools. As a key player, REINC was charged with the overall project management, co-ordination, and programme implementation. The contractual role involved REINC acting for the interests of the schools to engage with the Ministry. Yet noteworthy for this thesis is one inextricable fact. The Director-Project Manager, responsible for co-ordinating the cluster, is the actual researcher.

Significantly, the nexus of the cluster with REINC spotlights my dual positions as the TDI Cluster's Project Manager and the REINC Rural Schools' Co-ordinator. In this professional capacity, I worked with the Management Group principals for the full six years of the project. During the inception phase, I started in a low key role as a support co-ordinator for the REINC Manager who was in charge of the programme facilitation. My brief was also to act as the minute-taker for the

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[2] *REINC is a pseudonym for this organisation providing support and education to rural communities.*

cluster meetings. As time went on, buoyed by the advantage of postgraduate study, my knowledge developed and expertise grew. This career pathway strengthened to such an extent that by the latter years of the TDI project, I took on the title of Director and, as such, was solely responsible for the co-ordination and implementation of the overall operation. Yet most relevantly for this investigation, my cluster predisposition collides with the academic perspective of the researcher. These are conflicts of interests and have strong ethical implications for this thesis. Consequently, I am classed as a vested-interest researcher with 'insider knowledge.' In this compromising position, I have the potential to colour the findings and possibly influence the outcomes from the study.

This convergence also marks my multi-faceted identity and brings me into the field of gifted education. This world is where my personal passion connects my private life and professional career. These two realms overlap because my commitment to supporting high ability children is a personal philosophy which filters into my own family. The underlining principles of gifted and talented education coincide with my own ethos of raising our three children. My eldest and youngest have been identified as gifted throughout their schooling. My son is now training as a doctor, and my daughter is in her final year of the International Baccalaureate programme. Furthermore, my second son is considered artistically talented and undertaking a university design innovation degree. Interestingly for this study is the fact that my daughter was a founding pupil of the cluster's TDI provision and participated in the inaugural programme from 2003 to 2004. This equates to an added dimension for the researcher as a mother of a 'Cluster kid.' In my conviction to honour the specialness of each child, I encourage my own family and the cluster students to fully develop their talents so that they become the best they can be. This is the crossing-over of my ethos as a parent and an educationalist. Supporting children to reach self fulfilment is thus both my personal mantra and my professional creed.

Intrinsic to my philosophy on gifted education is the underlying theme of social justice. I believe that equitable access to rich opportunity is of the utmost importance to the realisation of potential. In basic terms, this simply means that children belonging to the specific subgroup of 'gifted and talented' students are

entitled to a high quality education, customised to their personal needs. The New Zealand Human Rights Commission endorses this premise and propounds: "All children have the human right to benefit from an education that will meet the needs in the best and fullest sense, an education that includes learning to know, to do, to live together and to be" (2007, p. 8). This human rights' perspective complements the thinking behind President John. F. Kennedy's Civil Rights Address: "All of us do not have equal talent, but all of us should have an equal opportunity to develop our talent" (cited in NZAGC Tall Poppies, 2008, p. 33). The Ministry of Education also recognised this moral principle of equality. Mallard, the Labour Government's Minister of Education, made this policy statement:

> All children have a right to an education that acknowledges and respects their individuality and that offers them maximum opportunities to develop their strengths and abilities . . . Gifted and talented learners are those with exceptional abilities relative to most people. These individuals have certain learning characteristics that give them potential to achieve outstanding performance. (2002, p.1)

For this thesis, the term 'gifted and talented' will be used in a synonymous and interchangeable sense to refer to a differentiated group of exceptional children. This construct will not make a distinction between students being 'either gifted, or talented,' but instead include both collective meanings. However, when the group is referenced as 'gifted,' the definition will apply explicitly to a subpopulation of very intelligent children identified with the potential ability to achieve at a high academic level above their chronological peers. Conversely, the classification of 'talented' will relate to those children who demonstrate observable aptitudes in the areas of creativity, cultural expression, and the performing arts. Riley's summation is therefore apt: "Giftedness is conceptualised as a dynamic construct, sensitive to time, place and culture and inclusive of a wide range of abilities, qualities and talents" (2003, p. 21).

1.4   The purpose of the study

The purpose for this case study is to investigate the principals' perceptions on their cluster. The research will look at the relevance and value of the cluster to them as school leaders educating gifted and talented children. My research

intention is to analyse whether the cluster project could be considered a successful initiative to fill the void in the scarcity of New Zealand programme exemplars. The evidence of very few homegrown initiatives is made even more visible by the corresponding lack of recently published literature in the national research base. This finding is endorsed by Riley et al. "The literature review demonstrates a paucity of research, nationally and internationally, which examines the effectiveness of identification or provisions for gifted and talented students" (Riley, Bevan-Brown, Bicknell, Carroll-Lind, & Kearney, 2004, p. 269). The identification of such a breach has true resonance at this point. This is because my study is anticipated to bridge the research gap, in a small way, and to put forward the cluster project as an accepted New Zealand practice model.

This case study is grounded on an interpretive paradigm with a phenomenological slant. The focus group will be used as a forum to generate and gather the data for an examination of the cluster practice from the management perspective. The primary aim of this study is to find out what the school leaders think and feel about their cluster. This singular focus on the leadership means the research will be partly descriptive in nature, yet also contain an evaluative aspect on the effectiveness of the programme. Importantly, this aspiration is three-fold in nature because it relates directly to how the project was managed; to see whether the principals consider their management mechanism to be a workable model; and to uncover what they believe was sitting at the heart of their group philosophy to keep them together.

Thus, this qualitative study is underpinned by these three research question strands:

1. **In what ways were a group of schools involved in gifted and talented education managed as a cluster?**
2. **How effective was this management model as a mechanism to provide for gifted and talented children in a rural region of New Zealand?**
3. **What was important to the management leaders? How did they view the ethos of their cluster? To what extent was this thinking, this way of being, at the centre holding the cluster together?**

1.5 Structure of the thesis

The thesis will be organised into seven chapters (including the Introduction) and the structure will be as follows:

Chapter One: Introduction

This chapter introduces the premise for the thesis and establishes the problem of the study. The section includes the scope of the subject area with an overview of the content. There is a specific outline of the research questions. The role of the vested-interest researcher and the associated bias is covered.

Chapter Two: Background

This chapter outlines the setting for the cluster project as a Talent Development Initiative (TDI) and explains the complexity of the cluster's components. The background provides a necessary overview to inform the reader of the context to the research.

Chapter Three: Literature Review

This chapter presents an evaluative summary of findings from the literature review in relation to provision for gifted rural students, cluster provisions, the practice of Talent Development Initiatives, and the role of management models.

Chapter Four: Methodology

This chapter explains the rationale for the choice of methodology within a conceptual framework. There is a description of how these approaches were used, and an evaluation of the effectiveness for the research outcomes.

Chapter Five: Results

This chapter is an analysis of the data based on the perceptions of the participants. The findings are presented in reference to the research questions.

Chapter Six: Discussion

This chapter discusses the results in relation to the literature review and the TDI archival documentation including milestone reporting.

Chapter Seven: Conclusion

This chapter concludes the research, clarifies the limitations, and offers recommendations in regards to cluster provisions.

1.6   Summary

The significance of this study is its exploration of the premise that a cluster is an effective mechanism for making a difference to the lives of gifted students educated in a remote part of New Zealand. The project is to be considered in light of presenting a viable solution to the problem of rural disadvantage. The perceptions of the principals will reveal their thinking as to what makes the cluster tick, and how they value their management model in relation to the quality of the programme delivered. In this context, the study will be a vignette on what the experience of working as a team has meant to them. This 'slice of life' snapshot will tell the story of their journey as a cluster. It will then be left to the reader to decide if the cluster is a suitable model to fill the provision gap in the less-than-perfect world of Aotearoa-New Zealand gifted education.

CHAPTER TWO

BACKGROUND

2.1   Introduction

The concept of a cluster for the delivery of programmes to gifted children is a complex notion with multiple strands crossing over between entwining layers. It is a comprehensive and multifarious phenomenon. There is a convolution of interlocking perspectives involving students, schools, principals, teachers, parents, whanau, and community. A critical component is the vital connection between exceptional students and their classroom teachers. The other key determining factor is the addition of the external facilitation agency, REINC, to the myriad of interest groups. Therefore, the cluster conglomeration encompasses a range of interwoven components essential to the core identity of the TDI project. Yet most significantly, at the centre is the instrument of a committee to lead, direct, and oversee the educational practice. The overriding importance of the Management Group means that this central mechanism takes precedence within the cluster entity and is therefore the reason for the narrowed focus for this thesis.

As a means for simplification, this chapter establishes the setting in which the cluster germinated as a Talent Development Initiative (TDI). The background is made up of two tiers. The upper layer is the policymaking of the Ministry of Education (MoE), while the ground level is a localised situation for nine schools managing a gifted and talented education project. Fundamentally, the cluster TDI is framed by the broader ministerial conceptualisation of gifted education, but also centralised as a specialised invention for grassroots provision. Therefore, this chapter sets the early scene for the research and gives a framework for the focus group interview. In essence, the background describes the ways the cluster was managed from the onset, and as such, is a backdrop to point the way forward to answer the first research question.

Nevertheless, what is equally important at this early stage is the need to make note of the prejudicial slant emanating from researcher bias. The background is

informed by insider knowledge gained from first-hand experience within the cluster. This feature must be flagged as an inhibitor because of my contestable gatekeeping role for sifting, selecting, and prioritising material for the contextualisation of the study. The variable of conflicted interest cannot be separated out and substantiates Wellington's proposition that "the Researcher affects the Researched" (2000, p. 41). For Wellington, this principle of uncertainty is where "the researcher influences, disturbs and affects what is being researched in the natural world, just as the physicist does in the physical universe" (p. 41). Another theorist, Medawar, reinforces this predicament: "There is no such thing as unprejudiced observation. Every act of observation we make is biased" (1963, p. 230). The mere action of observing is filtered through past experience from a pre-ordained viewpoint. Thus, subjectivity is always prevalent and acknowledged as a limiting factor for my thesis.

Yet in a double entendre, the background also serves to distance these self-involved perceptions of a vested interest researcher. The report-like nature of the chapter works to diminish my partiality and place me at a more detached perspective in the research framework. Most notably, documentation from the TDI contract is used, where applicable, to give a sense of triangulation to this account. This archival source means the additional evidence from these records render the presentation more factual and substantiated. In consequence, the background is relevant as a two-fold device to set the cluster within the educational milieu, and dampen down researcher bias. Hence, the description of the context for this research means the chapter is organised into two parts. The first section describes the Ministry of Education's initiatives and corresponds to the origins of the cluster. The development and evolution of the TDI Cluster is depicted in the second section. In order to provide a coherency to the broad and multi-level background, the areas of interest will be discussed within the framework of the headings set down below:

Section One: A Ministry of Education perspective
- The recognition of gifted and talented students;
- The Ministry of Educations priority of professional development;

- The Ministry of Education's Talent Development Initiative (TDI) project; and

- The issue of isolation and rurality.

Section Two: Development of the cluster as a TDI
- The inception of the cluster as a new TDI;

- The school composition of the cluster;

- The relationship between the Management Group and REINC; and

- The practice of the Management Group within the cluster.

SECTION ONE

2.2   Gifted and talented students

In Aotearoa-New Zealand at the turn of the new millennium, the ideal of equitable opportunity for gifted and talented children was a strong tenet of thinking purported by the Ministry of Education. This identified subpopulation of children with high intelligence and special socio-emotional needs became a pressing concern for schools, parents, and the community at large. As a means of support, the Ministry of Education commissioned the writing of a research-based handbook (2000) for teachers to make links between theory and practice. Furthermore, a national group of academics and practitioners, recognised for their expert knowledge in gifted education, were commissioned to compile a Working Party Report (2001) to advise the Government on future direction. Importantly, this Working Party nominated three primary areas of focus that were particularly relevant to the rationale for establishing the cluster as set down below:

- A critical clause to be added to the national 'Administration Guideline 1 (iii)' to clearly identify gifted and talented students. This development would ensure the prioritising of gifted education in New Zealand. In line with this precedence, the Education Review Office (ERO) would formally evaluate schools on the mandatory requirements of this new regulation;

- The establishment of a contestable funding pool to support innovations and special developments in gifted education (the TDI projects); and

- The increase in the number of Gifted Education Advisors with a dedicated position for an appointed National Co-ordinator to oversee this advisory service.

The implementation of these three recommendations did impact on the schools in the region, especially the specific Ministry of Education requirement to ensure gifted and talented students were formally identified and individually catered for. This prioritisation of gifted education was a driver for the initial convening of a district-wide meeting to scope interest in a group submission. On a local level, the TDI funding was an impetus to make sure positive, far-reaching developments did happen for high ability children. Furthermore, the advisory service delivering professional development was a catalyst to start the process rolling and to bring REINC into the frame. This professional development knowledge informed the cluster schools' application and provided a theoretical framework from which to underpin the practice as a TDI project.

Critically, one other key aspect that came out of this Working Party Report (2001) was the emphasis on putting the child right at the centre of learning. The report signalled the importance of nurturing these students and providing an education to challenge their intellectual abilities:

> All children have a right to an education that acknowledges and respects their individuality and that offers them maximum opportunities to develop their strengths and abilities. Gifted and talented children will flourish in a society that acknowledges and respects individual difference and recognises and celebrates the abilities of its most able. (Ministry of Education Working Party Report, 2001, p. 16)

The Government policy acknowledged individuality, particularly the comparative differences in ability and promise: "Gifted and talented learners are those with exceptional abilities relative to most people" (Ministry of Education, 2002, p. 2). These students were considered to be beyond their peers in intellectual capability and specific domains of talent. The Ministry noted that while their certain cognitive, creative, and affective characteristics gave them the potential to achieve outstanding performance, these students could also require specialised learning opportunities. Moreover, due to the nature of their giftedness, these students were likely to need extra pastoral support for their socio-emotional development

(Ministry of Education, 2001). This statement from Mallard, the Minister of Education in the early 2000's, summed up this view: "Giftedness and talent can mean different things to different communities and cultures in New Zealand" (2002, p. 1). As such, the concept of giftedness was presented as a fluid, adaptable version to identify the cultural communities these children came from and affiliated to. This principle was particularly important for Māori and Pasifika students. Five years later, the Minister of Education, S. Maharey, stated in his opening address at the National Gifted and Talented Conference (2006) that: "A key factor in securing New Zealand's economic, social, and cultural success will be developing the potential of our most able and talented students" (p. 1). It was envisaged that both the gifted learner and the nation would benefit from this investment. Furthermore, Maharey recommended that the way forward to achieve this growth of 'intellectual capital' was through the child-centred approach of "personalised learning" (2006, p. 3). Maharey made this comment:

> Many teachers at the forefront of working with gifted and talented students have been setting the standard in personalised learning for a number of years … rather than just being receivers of knowledge, students are involved in generating knowledge as part of the learning process. (2006, p. 3)

Thus, the Ministry of Education policy was characterised by an adherence to a multicategorical, learner-focused ethos for gifted and talented education in New Zealand. These philosophical hallmarks undergirded the development of the TDI cluster's own way of working to reflect the collective belief system of the management principals.

2.3   The Ministry of Education's priority of professional development

Integral to the policymaking of the Ministry of Education, professional learning was enshrined as a priority for the recipients of the first round of TDI funding in 2003. The Ministry considered teacher training the key factor for improving classroom practice to better meet the needs of exceptional students. This statement from the handbook (2000) explained the Ministry's approach: "Professional development is an essential ingredient in developing, implementing, and maintaining effective programmes for gifted and talented students" (Ministry of Education, 2000, p. 10). Evidence from the New Zealand research base validated

the recognised importance of professional development at this time. In 2004, a comprehensive research analysis commissioned by the Ministry, Riley et al. made the recommendation that "the provision for gifted and talented students should be supported by ongoing high-quality teacher education" (2004, p. 278). As endorsement, Keen's finding in his study (2004) confirmed the necessity of a teacher training programme: "The great majority of students and parents called for enhanced and flexible regimes of gifted education, delivered by staff with appropriate training" (2004, p. 278). Moltzen agreed: "In New Zealand, every teacher is a teacher of gifted and talented" (2004, p. 27). This point was critical because exceptional New Zealand children were, for the most part, taught in regular classrooms alongside their chronological peers.

Specifically for the Ministry, there was the expectation that teachers in the TDI programme would demonstrate deeper understandings about "the needs of gifted and talented learners; how to identify gifted and talented learners and their needs; how to develop more responsive learning environments; and how to be more skilled at evaluating these programmes" (Ministry of Education TDI Contract, 2003, p. 9). The Ministry of Education and New Zealand educationalists concurred in their belief that professional development was an integral tool to raising teaching performance and the effectiveness of provision. In alignment with the research evidence and the need to improve this "much-neglected area of in-service professional development" (Ministry of Education Working Party, 2001, p. 30), the Ministry made the far-reaching decision to create another eight advisory positions. This policy impacted positively on the TDI Cluster because a regional advisor informally took on the mentoring role for the Management Group and REINC.

2.4   The Ministry of Education's Talent Development Initiative project

The Talent Development Initiatives were established on the recommendation of the Minister of Education's Working Party on Gifted Education (2001) to set up "a contestable pool of funding to support innovation and special developments in gifted education" (Ministry of Education Working party, 2001, p. 26). As part of the Government's overall plan to provide targeted assistance, $1.2 million-per-year was designated "to provide seed funding for school-based innovations and

pilot projects" (Riley & Moltzen, 2010, p.1). The financial support was for three years, from 2003 to 2005. Ultimately, the aim was to ensure that innovative strategies would "result in improved outcomes for gifted and talented students" (Riley & Moltzen, 2010, p. 1). To this end, seventeen projects within both the primary and secondary sectors were selected. These enterprises involved a wide variety of project structures, cross-sector groups, one day schools, and online programmes (Horsley, 2006; Riley & Moltzen, 2010). The primary rider for the TDI scheme was to attract a range of conceptualised programmes which were custom-made to reflect their individual school characters. Riley's research verified this premise: "In New Zealand, schools are given the latitude to develop programmes within each local context – in fact they are encouraged to do so" (2004, p. 9). Inherent within the TDI scheme was the expectation that projects would be sensitive to place and community, whilst making targeted provision for the diverse needs of the gifted students they represented.

Significantly for the cluster, the Ministry of Education pledged another round of contestable funding for the 2006 to 2008 timeframe. A primary characteristic of this second stage was the definitive focus on the social and emotional needs of gifted children. The aim was two- pronged to strengthen links with classroom practice and to address the specific needs of "rural schools and under-represented groups" (McDonough & Rutherford, 2005, p. 2). This next phase resulted in an increase in the number of TDIs to twenty-one programmes. Of importance to the cluster was the demarcation in the type of initiative with the creation of two sectors to cater for both existing and new initiatives. This differentiated model enabled five selected programmes to continue with ongoing ministerial funding. The cluster was one such successful project and was referred to as an 'Enhance TDI' for the last three years of operation. The financial resourcing from the Ministry concluded in December, 2008. Interestingly, the contestable funding pool concept was re-established towards the end of 2009 as an incentive to support rurally, isolated gifted and talented students. The final phase of the TDI programme was predicated on a strong Māori focus within a cultural framework. It is important to mention that this extended stage of the Ministry funding resulted in the appointment of REINC as one of the Ministry's three preferred service providers in New Zealand. The new cluster was based on the original TDI model

and consisted of a different group of schools located in a very remote part of the region with an extremely high percentage of Māori students. Noteworthy for this thesis is the fact that the REINC organisation has formally co-ordinated and facilitated gifted education provisions to school clusters for nine years.

2.5   The issue of isolation and rurality

A prime reason for the establishment of the cluster was to curtail the negative effects of remoteness and corresponding sense of disadvantage for gifted children. The cluster was situated in a regional area of New Zealand and supported by a rural education organisation. REINC's founding premise was to work alongside rural people to overcome the social inequity and educational disparity which can occur with geographic isolation. The schools in the region were distanced from ready availability to educational services to support gifted and talented students. New Zealand research undertaken by Apted, Macnee, Court, and Riley (2007) make reference to these specific constraints in relation to rural schools in general:

- "Isolation and restricted access to support services, networks, and advisors;
- Difficulties funding professional development and necessary resources;
- Lack of relievers available for professional development opportunities;
- Limited access to specialist teachers; and
- Difficulties in getting communities 'on board' with new developments" (p. 41).

Rurality was therefore a determining factor for schools to collectively move gifted students from the margins to the centre. At the nucleus was the focus on the educational enhancement of regional talent.

The origins of the cluster model began in 2002. This impetus for the instigating a form of collaboration came from professional development facilitated by the School Support Services Advisor. The Cluster's TDI Story provided this explanation:

> In mid 2002, a group of teachers were attending professional development with the Advisor, when she mentioned a funding pool for gifted and talented education. The teachers from rural schools working with REINC to provide extension programmes suggested that REINC could assist in

pulling together an application to the funding pool – and so the journey began. (Report to Ministry of Education, 2005, p.1)

From anecdotal accounts, it appeared some schools were already offering a range of extension activities for their very able students. There was indication that a few schools were networking to some degree, but not on a regular basis. As such, the provision was characteristically piecemeal in nature and this pre-TDI collaboration was summed up as: "These schools all had a variety of informal arrangements for in-school and conjoint programmes" (Report to Ministry of Education, 2005, p. 1).

The inclusion of REINC as an external administrator was explained by the fact that the Ministry's call for Talent Development Initiative proposals was not limited to schools alone. Rather, the contract extended to credible "organisations working in liaison with schools" (Report to Ministry of Education, 2005, p. 27). An outside service provider was only permitted on the proviso that "where community organisations apply, they do so, on behalf of the group of schools that would use their services" (Ministry of Education, 2002, p. 1). The principals approached REINC to assist their application and enter into a coalition. "REINC has the expertise and capacities to co-ordinate, facilitate, and add value to this cluster. [It can also] relieve the schools from the co-ordination, administration, and facilitation of the programme" (Ministry of Education, 2002, p. 9). The organisation accepted the role of representing the stakeholder group of schools and became the assigned fund holder for the contract.

In 2002, REINC called a district convention for late August so that interested principals from both rural and urban schools could come together. The purpose for this initial meeting was to discuss a joint submission to procure Ministry funding. The principals believed their gifted and talented children would be better served if the schools formed a collaborative community. This epitomised the Education Review Office's definition of "a geographical cluster providing programmes for gifted and talented students from a number of schools" (2008, p. 57). To ignite the application process, a team of two nominated principals, the REINC Manager, and the REINC Co-ordinator held a strategical planning session to decide the approach to their proposal. The procedure formalising this alliance

was cited as: "The cluster has been formed for the purposes of this application and to enhance rural schools by forming strong networks and clusters with urban schools" (REINC Cluster Funding Application, 2002, p. 9). The successful outcome for this consortium was the notification from the Ministry of Education, in November, announcing the cluster's confirmation as a founding TDI.

By way of summary, see below for a timeline on the Ministry of Education's policy decisions, evidence of a research base, and the developments of the TDI with a particular focus on the cluster project.[3]

Table 1: Timeline for Gifted and Talented Developments (2000 – 2010)

2000	Publication of the MoE Handbook on Gifted & Talented Students
2001	Working Party Report on Gifted Education for the Minister of Education
2002	A gifted and talented community added to Te Kete Ipurangi (TKI) website with case studies and online resources for schools, teachers, and parents
2002	Advisory service established along with a national co-ordination team
2002	Establishment of the contestable funding pool for innovative initiatives and request for proposals (RVP) ***Cluster convenes & collaborates with REINC to submit proposal for contestable funding***
2003	Commissioned MoE research conducted by Massey University (Riley; Bevan-Brown; Bicknell; Carroll-Lind; & Kearney)
2003	First round of 17 Talent Development Initiatives underway ***TDI Cluster begins***
2004	Publication of MoE Report (Riley et al.)
2005	Ministry implementation of NAG 1 (iii) to meet the needs of gifted learners in schools
2005	Second round of TDI funding open for submissions ***Cluster & REINC submit a successful application for second round of funding***
2006	'Ignite' and 'Enhance' TDIs underway Cluster in operation as 'Enhance TDI'
2006 August	Ministry of Education, "Rising Tides," National Gifted and Talented Conference Cluster presentation for Break-out Session at Conference
2007	ERO In-school Evaluation against NAG 1 (iii) for the provision of gifted and talented students and with follow up on 7 case studies of effective schools identified by ERO as "good practice"

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[3] *The specific developments for the cluster model and personnel are written in italics.*

2008 June	Publication of the two ERO Reports with the findings on general provision and individual "good practice" *One TDI Cluster school selected by ERO as a "good practice" exemplar*
2008	Publication and distribution of parent handbook: Nurturing Gifted and Talented Children, A Parent-Teacher Partnership
2008 December	Conclusion of TDIs *All nine principals committed to continue the Cluster project by funding from own school budgets* *Cluster awarded an endowment for funding from local community trust so sustainability ensured* *Cluster TDI project ends after 6 years*
2009 March	giftEDnz (The Professional Association for Gifted Education) established with an elected board, and an online newsletter sent out to the community members
2009 June	Inauguration of New Zealand Gifted Awareness Week
2009 November	Announcement of a new round of MoE contestable funding for gifted and talented education, focusing primarily on rural isolation, gifted Māori learners, regional direction, and a new identification resource toolkit for online publication
2009 December	The national advisory service on gifted and talented education is officially disbanded *REINC's application successful for new MoE cluster in another district of region*
2010	Assistant Minister of Education, (The Hon Heather Roy), becomes responsible for the Portfolio of Gifted and Talented education The Hon Rodney Hide takes over this Portfolio
2010	Publication of MoE Research and Evaluation Report on 5 TDI Case Studies (Riley & Moltzen)
2010 2010 May December	REINC titled a MoE "Preferred Professional Development Service Provider" *Appointment of REINC Cluster Director to giftEDnz Organising Subcommittee for a National Conference on Gifted & Talented Education in Wellington, 2012* *Seven schools of the original TDI Cluster included as part of the REINC Regional Gifted & Talented Education Project (funded by the MoE). The reinvented model continued to operate as a predominantly rural cluster in 2011*

The developments of the Cluster TDI project covers the decade from 2000–2010.

SECTION TWO

2.6   The inception of the cluster as a new TDI

The TDI project formally began operations as a cluster on the 4th February, 2003. The inaugural meeting of the Management Group was recorded in the minutes as: "Resolution: Ten participating schools' principals will make up Management Group. Principals will donate time" (Cluster Management Meeting, Minutes, 4.2.2003). In order to promptly start the gifted and talented programme, one of the first priorities was to draw up a universal gifted and talented definition so that schools could begin their identification process. It was considered important to come up with a mutually agreed concept. The meeting minutes show that by April, 2003, a consensus was reached and the decision was:

> Gifted children are those who are assessed in the top 95th percentile in a range of recognised, standardised cognitive tests. Talented children are classed as those who are assessed in the top ten percentile, in areas of creativity, physical, leadership and cultural capacity. (Cluster Management Meeting Minutes, 9.4.2003)

Student identification was the sole responsibility of schools; however, all names were held by REINC on a Cluster Register. Academic programmes for the brightest and most able students were geared at a higher or deeper level of thinking. These tailored opportunities were designed as cluster initiatives for the very intelligent children identified by schools as gifted. To cater for talented students, in-school workshops were pitched at extending skills in a performing arts style of programme, or in the sphere of creativity. These classes were facilitated by recommended tutors considered an 'expert' in a specific subject. Frequently, this community-based approach resulted in principals volunteering their own teachers as specialist practitioners. It was the role of REINC to source these authorities from the region and then subcontract their professional services. Therefore, networking and liaison within the local community was essential.

Most notably, all programmes in both the academic and talented categories were clearly differentiated as 'higher-level extension' for acceleration and enrichment purposes. The series of designated Mathematics workshops for the 'Otago Problem Solving' competition was an exemplar of this upper-level provision.

Furthermore, professional development was open to teachers as an in-school opportunity to learn from these tutor peers and thus gain deeper knowledge in a curriculum area. Subsequently, a diverse range of enrichment workshops based on the performing arts were offered over the first TDI contract. However, the significance of these 'talent workshops' diminished in the latter years. This was a result of the Management Group intensifying the focus on acceleration for identified gifted children. Importantly, the principals played an influential role in the design of the curriculum-based programme.

2.7   The school composition of the cluster

At the inauguration of the cluster, there were nine original primary schools with two cases of substitution over the full six-year TDI period. For the second round of funding, a secondary school joined the group as a cross-sectoral example of extended collaboration. This high school was not included in the data of the cluster. While the principal supported the TDI application, the school was never an active management participant, or a recipient of funding. These nine primary schools belonged to the cluster as an 'Enhance TDI' project, in the 2006-2008 timeframe. The principals (or deputy principals) of these schools made up the Management Group and were therefore considered as the research sample. The demographics and the special character of the schools are summarised in Table 2 on the next page.

Table 2: Demography and Special Characteristics of the Cluster Schools (2008)

School	Rural/ Urban	Full Primary/ Contributing	Roll	Decile	Special Character of Schools
Blue	Urban	Contributing	380	7	Large primary; Principal appointed to REINC Board to represent cluster; belonged to informal cluster pre-TDI
Bottle Green	Urban	Contributing	234	5	Integrated Catholic
Yellow & Black	Urban	Contributing	452	3	Large primary; high % Māori students; belonged to informal cluster pre-TDI; 2 representatives on Management Committee
Orange	Rural	Contributing	100	5	Semi-rural; newest Principal to cluster

Black & White	Rural	Full Primary	12	7	Small, one –teacher; isolated; farming area; belonged to informal cluster pre-TDI
Red & White	Urban	Contributing	140	1	Very low decile; high % Māori
Purple	Rural	Contributing	80	6	Medium-sized rural
Green	Urban	Contributing	485	5	Large primary; ERO 'Good Practice' Case Study School
Black	Rural	Full Primary	220	3	99% Māori; Level 1 Immersion Te Reo taught in 6 out of 10 classrooms; Principal on Advisory Group for gifted education; strong community & whanau-affiliated school

The distinctive characteristics of the schools within the cluster are set out below to show their diversity:

- There were four rural schools, with the smallest situated over ninety kilometres from the nearest city and regarded as an example of 'backblocks' New Zealand. The rural factor meant that two of these schools were full primary, whereas the rest only went up to Year Six;

- The Catholic school added a religious dimension to the otherwise secular group. This school principal valued the opportunity to belong to a local school network, to lessen the sense of separateness;

- Only one school was classed as bilingual with an immersion unit and reflected the almost one hundred percent Māori ethnicity of the children. This translated to budget funds allocated to programmes taught in Te Reo Māori for the identified gifted students. Several of the schools had a high ratio of Māori children attending and this matched the fifty percent and higher demographic composition of the region;

- The range of school deciles were from one to seven in ranking. This differentiation indicated the socio-economic breadth from poor, state housing areas to very middle class sectors. Aligned to these schools were identifiable farming districts, or professional communities; and

- Most of the schools belonged to the district-wide Principals' Association. The country schools also affiliated to an offshoot conglomeration of only rural and small schools.

The TDI cluster was summarised as "a collaborative and collective one" (REINC Cluster TDI Proposal, 2005, p. 4). For the purposes of the Ministry contract, five schools in the province's city were included. The construction of this rural-urban amalgam was due to the city principals articulating an urgent desire to be part of the cluster. They felt their schools still faced the problem of distance from central resources, albeit to a lesser degree than their rural counterparts. These leaders knew there would be clear benefits for their most able students if they worked together. Crucially for the stakeholder schools of this external contract, the REINC prerogative to represent only country communities was waived as long as several rural schools were involved. It was the assorted mix of rural with urban schools that became a distinguishing feature and an important dynamic for the group. "Each school needed a programme that would match their own special character (including a school with an immersion unit), and which could be tailored to suit their students' needs" (Report to Ministry of Education, 2005, p. 1).

2.8   The relationship between the Management Group and REINC

REINC was a not-for-profit organisation and an incorporated society with charitable status. Primarily, REINC was resourced by the Ministry of Education in its mission to provide lifelong learning support across diverse communities within a vast rural area. The organisation's structure and staff expertise enabled REINC to take on outside contracts; hence, the facilitation role for the stakeholder schools in the TDI cluster. Within the REINC administrational capacity was a system of financial accountability including an annual audit carried out by the Government's Auditor General's Office. As another mechanism of quality assurance, REINC had a democratic constitution with an elected board. The role of the governance body was to oversee and review the overall operations in the early childhood, school, and community sectors. In the latter years of the project, a principal from the Management Group was co-opted onto the REINC Board. The member acted on behalf of the interests of the management team for the last two years of the TDI contract (2007-2008), culminating in a raised political profile for the cluster with his appointment as Deputy Chairperson.

In basic terms, the structure of the cluster was divided into two parts: management and facilitation. The working relationship between the Management Group and REINC was considered to be crucial to the entire project. Each partner was a stand-alone body with its own sovereignty, but worked alongside each other. "The co-operative, collaborative approach of the whole team has lead to a strong cross-sectoral approach in meeting the collective needs of the group and this is both acknowledged and celebrated" (Report to Ministry of Education, 2005, p. 9). The principals were the overseers of the project, whilst REINC carried out their decisions to implement the initiatives. "The Management Group decides the direction of the programme, while the Director and Co-ordinator (REINC) put this into action" (p. 9). Therefore, the management leaders shaped the provision, whilst REINC operationalised the multi-faceted contract at ground level and on an everyday basis. Furthermore, REINC was the agreed financial administrator of the contractual funds including the payment of accounts, "tutor contracts and staff payroll" (Report to Ministry of Education, 2005, p. 10). In this context, REINC was charged with these responsibilities: the tracking of finances; the reporting of the budget expenditure at the management meetings; and the financial reporting to the Ministry for the incurred costs of the contract. The role of facilitation was defined in the TDI Cluster Story for the Ministry: "The Management Group have noted that having REINC as a neutral partner is very important to the success of the programme, particularly in regard to organisation, administration, and compliance tasks" (2005, pp.10-11).

In the setting up of the TDI contract, the director's function was considered so crucial to the cluster that it initially came under the auspices of the REINC Tumuaki-Manager's brief. The researcher worked in the position of co-ordinator for the entirety of the cluster, but in the latter stages I was also assigned the directorship of the contract. A major part of my role was to communicate and liaise with the principals in the co-ordination of the withdrawal programme. Keeping-in-touch and sharing information with the Management Group was considered critical to the running of the cluster. The interaction happened mainly via e-mail, but also by telephone, and sometimes as face-to-face meetings with key principals to strategise for future cluster developments.

2.9   The practice of the Management Group

The education programme was designed to challenge the cognitive thinking of gifted learners and the performance levels of talented students. An integral part of the set of provisions was the multi-sided approach to evaluation by students, tutors, teachers, REINC co-ordinator, and principals.[4] The feedback was presented at the management meetings for discussion and appraisal to inform the mandatory milestone reports, or for future programme initiatives. The formal process for the leadership unit was described in this way: "The Programme Management Group will maintain the links to the programme objectives, develop milestones, collect data and review procedures, and maintain financial controls" (Ministry of Education Cluster Funding Proposal, 2002, p. 2). Thus, in constant consultation with the principals, REINC personnel collated their oral and written input to compile a shared review of practice.

The Management Group was at the core of the cluster. The principals' mission was to "develop, sustain and maintain a cluster of rural and urban schools to introduce and develop practices within and among schools leading to sustained, improved programmes for gifted and talented students" (Ministry Contract, 2003, p. 7). This consultative, decision-making process of management resulted in the members of the group coming together on a regular basis. There were usually at least two meetings per term supplemented with sessions for milestone reporting and subcommittee items. During the six years of the TDI, there were well over fifty management meetings. In the fourth term, a full-day cluster meeting was held to evaluate the cluster programme and to collectively plan for the year ahead. This information-sharing and group assessment then filtered into the annual Oral Milestone Evaluation with the Ministry of Education representative. The hospitality, or manaakitanga, was a feature of these meetings with working lunches provided for busy principals. Minutes were formally recorded and always included a section allocated to evaluation, followed by the planning of programme implementation.

> The meetings start with a mihi, karakia and shared kai – some travel an hour and a quarter to attend. Attendance always averages at least 90% ... The meetings last up to 2 hours in school time and have a packed agenda.

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[4] *On specific occasions, parents were asked for their views and opinions as well.*

All are very involved and enthusiastic about planning for the best interests of their students and school communities. (Report to Ministry of Education, 2005, p. 10)

2.10　Summary

This chapter described the setting and the educational milieu of the cluster. As background information, it provided an insight into the workings of the project. Yet at the same time, the matter-of-fact account was an endeavour to diminish insider bias. Importantly, this contextualisation explained the rationale behind the Ministry of Education's TDI programme with the research that informed gifted and talented policy. The background spotlighted the early development of the cluster as a TDI, aligned with the specialised ways the model was managed and co-ordinated. In accordance with its relevance to the cluster, the management mechanism was placed at the forefront of the contextual framework.

CHAPTER THREE

LITERATURE REVIEW

3.1   Introduction

A critical point for this literature review is that all the theory and research uncovered was filtered through a 'gifted and talented education' lens. Furthermore, the review was premised on only scholarly literature comprised of peer-reviewed publications found in moderated professional sources such as conference papers, official Ministry of Education reports, or educational bulletins. In a twofold sense, the literature scope provided both a general base, and a narrowed focus to authenticate the cluster within the New Zealand gifted education milieu. Correspondingly, New Zealand researcher, Keen, offered apt advice in this statement: "Effective provision is dependent on informed knowledge for those planning and providing a programme" (2004, p. 263). Therefore, the primary intention of the literature review was to inscribe a sense of background and coherency to this case study, from both a national and an international perspective. The researcher sought to find wide-ranging information on gifted and talented education through the Massey University electronic databases, including its library catalogue, and by using the World Wide Web. Yet a noteworthy point for this thesis is that the review unturned few sources in the New Zealand context of gifted rural education. This discovery concurred with the important finding of Riley et al. "There is a paucity of reported national or international research which evaluates the effectiveness of provisions for gifted and talented students in relation to social, cultural, emotional, creative, and intellectual outcomes" (Riley, Bevan Brown, Bicknell, Carroll-Lind, & Kearney, 2004, p. 3).

The second aim of the literature review was to situate this study of a cluster within the Aotearoa-New Zealand framework of gifted and talented education. Hence, the focus centred on finding material to support or reject the assertion that "in New Zealand, gifted programmes operating beyond a single school are relatively

rare" (Reid, 2004, p. 430). This statement had relevance for examining the feasibility of the cluster mode and the management mechanism to implement a collaborative provision. Clough and Nutbrown referred to this need for validation as "radical reading [which] provides the justification for the critical adoption or rejection of existing knowledge and practices" (2007, p. 99). In such a context, the literature was a benchmark for measuring the effectiveness of the cluster and management model against similar provisions in New Zealand at the same time. Furthermore, the theoretical review acted as a device to uncover commonalities, or differences, with other existing exemplars. Thus, a tenet of the literature analysis was to determine whether there existed written evidence to authenticate a sound 'fit' for this particularly case study within a New Zealand paradigm.

3.2   The outline of the literature review

The literature review was based on the premise that there are separate concepts which interrelate and overlap within the cluster phenomenon. The categories of literature are diagrammatically presented to show the scope and classification of the search. The widest and most generic strand is the classification of rurally gifted students positioned on the figure's outer rim. From this angle, the search then filters down into increasingly specific areas to finally focus on management models of school leaders and co-ordination examples. This guiding principle is depicted in Figure 1 below.
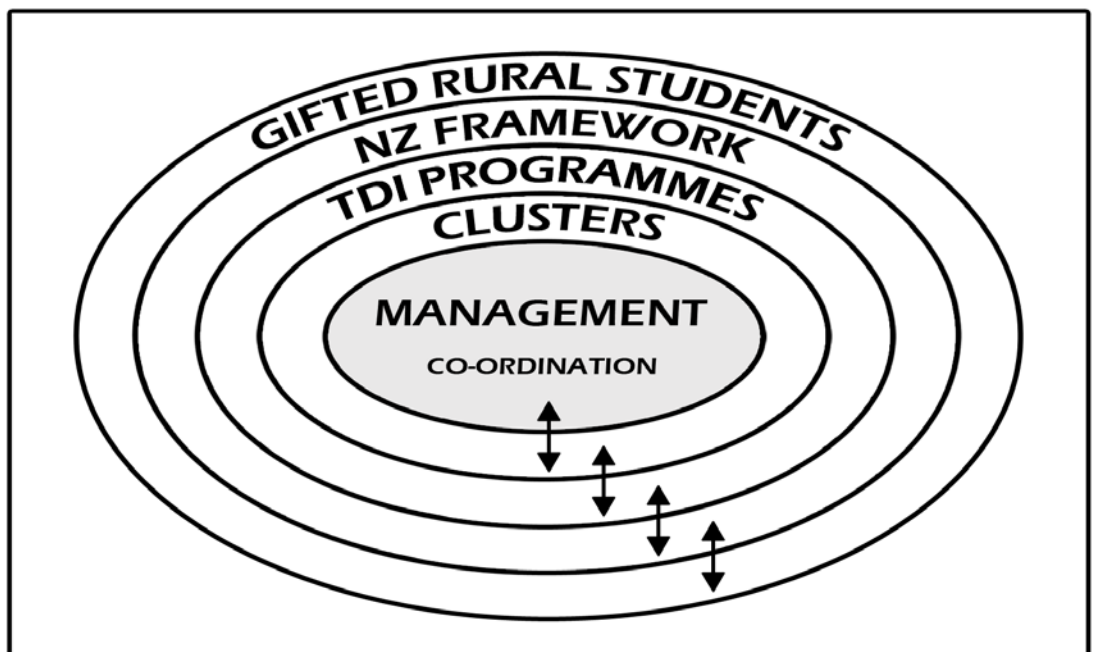
Figure 1: The Interrelated Concepts within the TDI Cluster Model

The interconnecting terms in the diagram are explained as follows, and will be discussed in depth for the remainder of the chapter under the headings set down below:

1. The educational provisions for gifted rural students;
2. The framework for New Zealand gifted and talented education policies;
3. The Ministry of Education's TDI programmes;
4. Clusters as modes of delivery; and
5. Management models and the co-ordination of clusters.

3.3   The educational provisions for gifted rural students

The intention of this section was to examine the state and nature of gifted provision in New Zealand rural schools for the period of the early 2000's to align with the cluster's inception. The most critical finding was that the review yielded only three studies: Ayr (2001); Riley (2003); and Apted, Macnee, Court, and Riley (2007). As a starting point, this statement by Ayr sharply set the scene that "New Zealand's rural children with special abilities are the forgotten 'poor relations' in our education system" (1998/99, p. 1). Ayr further remarked: "The sad fact is, as the majority of researchers have noted, that children with special abilities in rural areas are less likely to be catered for at all than their city cousins" (p. 1). Ayr clearly indicated that rural giftedness was in a deficit-based situation. This study proved of limited value for my thesis because it was basically a review of international works with little material on new findings. Moreover, Ayr attempted to find a causal link between social deprivation and Māori underachievement, but this was not substantiated by external evidence. Ayr also offered a debatable connection between socio-economic circumstance and low occurrence of giftedness in poor Māori children from rural areas. As an oppositional viewpoint based on the Ministry of Education's core principles for gifted education, this statement made a vivid contrast: "Gifted and talented learners are found in every group within society, including different ethnic, socio-economic, gender and disability groups" (Ministry of Education Working Party on Gifted Education, 2001, p. 19). This inclusive view had a good deal more validity for the cultural context of Aotearoa-New Zealand, and hence strong resonance for the regional world of the cluster.

In comparison, Riley's research (2003) was rigorous and reliable. The study stood up to scrutiny because findings were confirmed with collated evidence. The data backed up the supposition that rurally, gifted education was in a position of default. The survey, based on a questionnaire sent out to 624 principals of full-primary schools, showed that responses were received from only 206 principals. This low return rate may have indicated the low priority for gifted education in rural schools at that time, or perhaps the lack of professional knowledge on identification and provision. Tellingly, only thirty-seven percent of responding principals believed their gifted and talented students were well catered for. However, it is the inference that the other sixty-three percent felt these children were inadequately served that is more significant to my inquiry. Riley's study (2003) raised unsettling questions concerning the overall quality of education gifted and talented children received in country areas. This research pointed to a rather fragmented approach from schools, with little clarity and coherency throughout rural New Zealand. On a less ambiguous note, the respondents clearly identified the issue of geographic isolation as a barrier, particularly in regards to the distance and access to programmes. Yet another gap highlighted was the need to prioritise professional development for upskilling teachers in their understanding of these children. Highly relevant for my thesis was the fact that principals believed that there was a need for more gifted education models to learn from specific to New Zealand. Noteworthy was Riley's challenge to the education fraternity: "If New Zealand's rural educators can discover ways of meeting the needs of gifted and talented students, they could well be the world's cartographers for that roadmap" (Riley, 2003, p. 26).

While a study undertaken by Apted, Macnee, Court, and Riley (2007) was not explicitly anchored on the rurally gifted, it did offer solid background material. In addition, there was a strong discussion around factors contributing to the state of progress in schools, during the 2000's. Pertinently, the article did suggest that several restraints were identified by principals of smaller schools which inhibited the development of gifted programmes. Isolation was viewed as a restriction for supporting professional development. This impediment impacted further on the practical issue of a scarcity of relievers to release staff. The negative situation had a flow-on effect because it was difficult to enlist 'buy in' for the importance of

differentiated gifted education from school communities. Keen also identified other valid concerns vocalised through the viewpoints of educators, students, and parents. The respondents pointed out that the cost to access services for their children should be considered both in time and money, simply because the onus fell to families to "prioritise both its material and spiritual commitments" (2004, p. 280). Although Keen's perspective did not touch on rural New Zealand, there were clear commonalities. Therefore, it is reasonable to believe that for rural families this problem would have been exacerbated by the extraordinary expense of long distance travel. As a variable, rurality certainly magnified the severity of issues present within the national gifted education system.

In terms of international literature on rural giftedness, very little relevant evidence was unearthed. The material which came to light, while informative, was not comprehensive. However, one American study by Colangelo et al. (2003) was used as an international base by Riley (2003) to assess the New Zealand gifted education scene. This examination of gifted education in rural American schools was grounded on the assertion that "luck of geography should not dictate the opportunities to identify and enhance talent" (Colangelo, Assouline, Baldus, & New, 2003, p. 572). Yet in their search of written works, Colangelo et al. made a common and striking discovery: "The literature on gifted education is as sparse as a rural population" (2003, p. 572). The paucity of American research on the rurally gifted mirrored the gaps obvious in the New Zealand context. Furthermore, these authors commented on the "see-saw effect in interest" (Colangelo et al., 2003, p. 577) that gifted education in rural regions experienced from the Establishment. Such a comparable situation paralleled the fragmented New Zealand picture depicted by Riley where "each school does its own thing" (2003, p. 21). Moreover, Colangelo et al. argued that the "level playing field" (2003, p. 577) concept of equity in education had actually worked against the students, the group the policy was designed most to help. Correspondingly, this observable development had political significance in the historical New Zealand scene, particularly with the knocking power of the 'tall poppy syndrome.'

Faulkner and Lyons (2006) offered an Australian example to illustrate that extreme remoteness caused severe limitations on the school support services for

gifted children. This research referred to a national study (Harding, McNamara, Tanton, Daly, & Yap, 2006) on social disparity, which concluded there was a strong spatial clustering of disadvantage because of the intrusive rurality factor. The Australian research team reported that "by virtue of geographical location, gifted and talented children in regional and rural areas typically experience inequitable access opportunities to appropriate intellectual and cultural experiences" (2006, p. 60). The authors went onto acknowledge that these students "were under-identified and their specific learning needs were less frequently recognised, compared to their urban cousins" (2006, p. 60). Hence, the theme of geographical inequity correlated directly to the New Zealand scenario, albeit to a less accentuated degree.

In Great Britain, there was light evidence of web-based literature as found on the site of the *Gifted and Talented National Rural Network* (2008). The electronic information pointed out recent progress for the increasing importance of gifted education in rural schools. This website was a most informative resource tool. Under the notion of a "guide to rural-proofing" (2008, p. 2), there appeared to be a move afoot in the English counties to celebrate gifted and talented learning. This elevated profile recognised a wide range of special abilities, especially rural and land-based skills. Indeed, the website showed innovative thinking in gifted education and suggested the development of a new rurally-tilted concept of giftedness. As such, this type of agriculture orientation may well be worth considering for extremely rural regions of New Zealand. Interestingly, the inclusive concept urged schools to take account of land-based activities to support personalised learning paths for a broad-ranging curriculum. Suggestions included small animal care, gardening, environmental studies, or energy conservation. This online resource was very practical and extremely forward-thinking. The highly imaginative approach had real application and appeal for New Zealand rural schools, but in the future, rather than as an example to compare past provision during the TDI phase.

3.4　The framework for New Zealand gifted and talented education

The literature created a lively picture of the state of gifted and talented education in New Zealand schools, from the late 1990's through to 2008. The sources suggested it was an invigorating era with strong support in policy and resourcing from the Ministry of Education. This decade was portrayed as "an exciting time in gifted education" (McDonough & Rutherford, 2005, p. 3). The publication of a research-based handbook (2000) for schools launched the thrust of this momentum. This 'blue handbook' was deemed to be an excellent resource for teacher. There was full coverage in the content of the principles underpinning gifted education and a crisp description of the characteristics of giftedness. Furthermore, the Working Party Report on Gifted Education (2001) proved to be an influential work which made a positive impact on the type and quality of provision. Basically, the Working Party was set up by the Minister of Education to "provide advice on a new policy and funding framework for gifted education … and to the development of a long-term plan for the proper organisation and effective resourcing of the sector" (Ministry of Education, 2001, p. 5). In accord with the recommendations from the Working Party Report, there was a revitalisation of interest in the field. McDonough and Rutherford stated that the Government's gifted and talented policy for 2002, coincided with the establishment of a raft of initiatives aimed to "promote wider understanding and expand the knowledge base" (McDonough & Rutherford, 2005, p. 2). More explicitly, the premise for the TDIs was to "support innovations and special developments in gifted education" (Ministry of Education, 2001, p. 26).

This resurgence in gifted education was clearly marked by the compliance regulations for schools. As previously mentioned in the Background chapter, the mandating of policy for the 'National Administration Guideline 1(iii)' was a watershed moment. In effect, this meant that from the beginning of Term One, 2005, all schools had to demonstrate how they were meeting the needs of their gifted and talented learners. To assist schools, the Ministry committed funding for twelve advisors and a national co-ordinator (Moltzen, 2004). Thus, professional development was held to be a vital tool for improving teacher practice and lifting outcomes for students. Unsurprisingly, there was a good deal of evidence in the literature testifying to the importance of teacher training for strengthening the

quality of education for gifted students (Moltzen, 2004; Riley, 2003; Riley et al., 2004; Horsley, 2006; Apted et al., 2007; Clark, 2009). Most important was the prioritising of professional development to become a key plank to the Government's policy on gifted education at this time. Moreover, there was a high ministerial expectation for the TDIs to ensure the principals and co-ordination staff underwent professional learning to bolster the quality of their provisions.

The Education Review Report (2008) provided a particularly useful evaluation of provision in New Zealand schools. This was the first time that schools had been so thoroughly and explicitly examined by the Education Review Office (ERO) in the field of gifted and talented education. Significant for this thesis, there were several impactful findings from this formal evaluation process. The ERO study (2008) based the in-school assessment on a range of indicators to signify 'good practice' for gifted and talented education:

- The provision for gifted and talented education was embedded in school culture and practice;
- There was school-wide shared understanding about gifted and talented education;
- There was regular consultation, communication, and collaboration among staff, parents, whanau, students, and wider community;
- The school had good policies, procedures, or plans for gifted education;
- There was sound leadership for the provision, for example, principal, designated co-ordinator, or team;
- The school was building capability through a planned approach to school-wide and ongoing professional development; and
- Gifted and talented education was well resourced through informed decision-making about staffing, funding, and programmes.

Of crucial importance, the Education Review Office found that thirty-six percent of schools "did not have good provision for gifted and talented in any of the five evaluative areas" (2008, p. 46). Notable too was the statistic that only "18% had good provision" (p. 46) over all the stipulated categories. Critical for the cluster was the edict that "urban schools were more likely than rural schools to have responsive and appropriate provision and programmes" (p. 47). This division between the quality of urban and rural education endorsed the earlier findings of

Riley (2003), and Colangelo (2003). In general, the "majority of schools" (ERO, 2008, p. 46) could not demonstrate achievement and progress of students; did not recognise their special social and emotional needs; and did not foster interaction between teachers, parents, and whanau on their holistic well being. Evaluation through school self review was poorly done and "highly developed or developed in only 23% of schools" (p. 35). Furthermore, ERO identified a direct correlation between school evaluation and practice. In other words, the Education Review Office found that the more developed a school's self review process, the more responsive and appropriate the programmes.

The Education Review Office also amplified the impact of school leadership as a mitigating factor for school responsiveness. In its research of the necessary ingredients for sound provision, ERO (2008) concluded that a two-pronged approach was best. Simply, this was because those models of good practice identified had designated co-ordinators who worked with other staff to engender knowledge, interest, skill, and passion. Furthermore, Riley and Moltzen (2010) concurred with the ERO analysis. Their conjoint study testified that co-ordinators certainly needed to have a background in gifted education and the opportunity for ongoing professional development. Most tellingly, ERO (2008) found that when schools worked together in clusters to share knowledge, the teachers were better informed about gifted education. This finding from the Education Review Office clearly supported the premise that clusters were successful mechanisms for raising the effectiveness of schools to better provide for their exceptional students.

3.5 The Ministry of Education's TDI programmes

Clearly, the best literature source for an in-depth review and evaluation of selected TDI projects was Riley and Moltzen's conjoint case study research (2010). The information contextualised the cluster and explained the rationale for the talent development approach to New Zealand gifted education provision. Riley and Moltzen outlined that the TDI scheme for 2006 to 2008 illustrated the Ministry of Education's vision to support three key areas:

- The development of innovative projects, which lead to improved outcomes for students;

- Research into the impact of innovative approaches on learning and teaching; and

- The sharing of knowledge of models of practice with others in the sector.

Critically for this thesis, the TDI research presented several key conclusions. One major finding, based on the identification of a specific enabler, had special applicability for the cluster. Riley and Moltzen made a clear endorsement for the dedicated role of a passionate and committed programme director. Such a person required expert knowledge in gifted education. This pivotal position included the need for robust human resource skills and the ability to engender good communication with stakeholder groups (Riley & Moltzen, 2010). Furthermore, another prime determinant for effectiveness was the open team approach through an advisory group or committee. Ongoing professional development was also pinpointed as an essential ingredient for raising the quality of programmes. The uniqueness of the Talent Development Initiatives embodied the Ministry's philosophy (2000) that "each school or organisation create, adapt, or adopt their own definition of giftedness" (Riley & Moltzen, 2010, p. 9). Paradoxically, this individuality made for a fragmented research field with its own inherent limitations. Riley and Moltzen alluded to this problem as "difficulties arise in making generalisations or comparisons across evaluations" (p. 9). However, the purpose of their research was to illuminate the degree of effectiveness for each of the five TDIs, rather than abstract the commonalities across them all.

Horsley (2006) provided an example of research directly concerned with making a judgement on the value of the first TDI projects over the period 2003 to 2005. This paper was relevant because it used a transparent and solid methodology to gauge the thinking of the TDI project directors. Questionnaires were sent out and then the data was triangulated with semi-structured interviews. The result featured a taxonomy formulated on the "Ten Principles for Gifted and Talented Programme Success" (Horsley, 2006, p. 71). These identified strands were wide-ranging and have credence for the cluster as a TDI. In brief, the areas of relevance concerned the following findings: [5]

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[5] *The outcomes for the cluster are highlighted in italics.*

- Principle # 1: Establish a sound mentor-mentee relationship. *The cluster was fortunate to develop a strong relationship with an advisor as an informal mentor. However, the TDI assigned mentor policy did not actually happen and proved to be a flawed strategy for the cluster*;

- Principle # 3: TDIs should plan for sustainability well in advance. *The cluster investigated other funding sources from local community trusts, which eventuated in additional resourcing, post-TDI*;

- "Principle # 4: Involve your principal in your project" (2006, p. 73). When the principal led the vision in schools, this brought about greater staff buy-in and commitment for the scheme, which in turn resulted in more positive student outcomes. It was believed that the triadic relationship between "[whole] staff commitment, school culture, and principal leadership" (2006, p. 73) augured well for a successful project. *The cluster was solely predicated on the involvement of each school's principal and therefore totally espoused Horsley's recommendation*; and

- Principle # 10: Ensure your project staff members are suitably qualified and able to undertake ongoing professional development. *Postgraduate study by the co-ordinator considerably helped to inform management discussion and programme decisions*.

Horsley's study linked directly to several important aspects for the functioning of the cluster in the preliminary stages of the TDI programme. The cluster embodied several key principles and reflected their importance in practice.

3.6   Clusters as modes of delivery

In the literature, the term 'cluster' was used in a contestable sense and hence meant different things to different people. For illustration, the act of 'clustering' was a well-known theory within the United States and therefore highly familiar to American educators. However, the main point for this thesis is that there is a divergence over the application of the terminology. Renzulli (1997) used the concept in the clearly defined context of enrichment for non-graded and mixed ability students. In other words, these types of clusters did not specifically apply to gifted education provision. The "enrichment clusters are designed for authentic learning" (Renzulli, 1997, p. 3), but notably, they included non-gifted learners. Reis (1995) agreed with Renzulli's definition but even more generally as a

"means by which pedagogical strategies commonly used in gifted education can be extended to the entire student population" (Reis, 1995, p. 7). Furthermore, the fluidity inherent within this pedagogical connotation exemplified the 'cluster groupings' of Winebrenner and Brulles (2008). This expression equated to "when a group of identified students is purposefully clustered in a mixed ability classroom" (Winebrenner, 2008, p. 1) for a set part of the school day. The cluster group allowed gifted students of similar ability (top five to eight percent in their grade level) to learn together at "extended levels of complexity and depth in a given area" (2008, p. 3). Although Winebrenner and Brulles' concept differentiated for giftedness, in reality, the definition of a cluster in the United States clearly does not have the same meaning in New Zealand. Thus, the construct can be said to be context-driven. For the purposes of my thesis, the term 'cluster' is defined as a group of schools working together to extend and challenge gifted and talented students. This construction demonstrates that the cluster was a consortium of principals who pooled their leadership strengths to collectively enhance outcomes for their exceptional children.

Interestingly, the only British-based articles sourced were not actually from the gifted field, but instead written for the rural education sector during the early 1990's. These publications relayed the need to professionally support teachers in isolated schools, and to bring country children together to strengthen their social-emotional development. The articles highlighted the importance of strong collaboration involving a committee. For example, Potters and Williams noted: "Small rural primary schools have been perceived as having much to gain from collaboration with other schools" (1994, p. 2). Ribchester and Edwards believed that "successful clusters consist of equally committed schools, all contributing and benefiting to a similar degree" (1998, p. 5). Clustering was therefore implemented to negate the possible marginalisation of small schools and to celebrate the power of collaborative effort.

With the advent of the British educational policy, *Every Child Matters* (2004), clustering again took prominence because it imbued "the principle of allowing governing bodies and joint committees freedom to determine their own arrangements within an agreed framework of common understanding"

(Richardson & Bartlett, 2006, p. 101). Further to this, Richardson and Bartlett argued that schools could become a federation to take collective responsibility for "the education, achievement and progress of all children within an area … to ensure comprehensive and inclusive opportunities for all" (2006, p. 101). In their view, clusters helped reduce the competitive elements between schools and instead replaced rivalry "with true collaboration aimed at improvement for all, whilst enabling schools to retain their individual characters" (p.101). The concern that "every child matters, not just the ones in my school" (p. 101) strongly reverberated for this cluster study as the consensual focus shone on all gifted and talented students in all the schools.

Finally, the New Zealand literature revealed very little of relevance for the entity of a cluster. However, it must be made clear that this lack of material around the conceptualisation of a gifted and talented cluster was not because collaboration was out of favour in education. Rather, the opposite applied. Group ventures between schools were lauded, as evidenced in this statement from the Ministry of Education's handbook:

> Schools may investigate the possibility of working together … Schools within regions may choose to share resources, staffing, and specialised curriculum strengths in order to offer a cohesive educational package for their gifted and talented students. (Ministry of Education, 2000, p. 45)

This type of clustering encapsulated the power of the collective to share resourcing and build a support package around students. The belief that clusters were considered a viable option was certainly backed up by Riley et al. (2004). These researchers explained that forty percent of their case study schools had applied informal clustering in some way. As this comment testified:

> A third school relished the idea of working together with a group of schools [and by] using a cluster approach, these teachers networked with other interested educators to develop and share the responsibility of providing a variety of gifted programmes in the region. (Riley et al., 2004, p. 254)

Furthermore, there was one school in the case study which collaborated with others in a group and brought in experts for curriculum programme. Such an example resounded on various levels for this thesis as those questioned believed

clustering to be "effective because they have a committed group of people working together" (Riley et al., 2004, p. 242).

In sum, from the somewhat sketchy references in the New Zealand literature, clusters were seen by schools as tenable mechanisms. However, this general opinion was more in regards to networking than a formalised and structured approach to managed delivery. Lastly, one core piece of evidence testifying to the merits of schools working in a cluster came from the Education Review Office (2008). The report indicated that students who participated in cluster programmes enjoyed the social aspects when learning with those of similar abilities and interests. This finding indicated the benefits of clustering for socialisation and confidence building.

3.7   Management models and the co-ordination of clusters

The literature review revealed little substance on the management of clusters. Furthermore, the specific information on management groups was set in the pretext of a school, and not an actual cluster. The national study undertaken by Riley et al. (2004) did produce some findings on the state and nature of co-ordination for gifted education in the New Zealand schools surveyed. Less than half the primary schools at this time took a team approach to co-ordination. In fact, from the questionnaire results, only forty-one percent operated with an organising committee. This statistic was the lowest in the primary sector, as compared to the intermediate and secondary schools. The Education Review Office evaluation (2008) confirmed this earlier discovery by noting that just over half the school were yet "to develop a systematic, shared, and co-ordinated approach to their provision" (ERO, 2008, p. 26). Pivotal to my study was the divide between urban and rural. This was because the "rural schools were far less likely to have a committee" (Riley et al., 2004, p.166). Indeed, merely twenty-one percent reported some form of collective effort; while in contrast, fifty-two percent of urban schools used this method for co-ordination. Furthermore, this team approach appeared to flow into the area of policy-making. Only sixteen percent of rural schools had policies specific to gifted education, whereas twice as many urban schools (thirty-three percent) indicated written procedures were in place. Thus, the comprehensive study compiled by Riley et al. suggested that the

factor of rurality, and its incumbent problems, impacted on the whole of gifted provision. Programme co-ordination and policy documentation were not undertaken to anywhere near the same degree in country schools. This was a relevant finding for the TDI Cluster with its fairly even mix of five urban schools and four rural schools.

In his survey study, Keen (2004) described the purpose and merit of an in-school committee. This researcher suggested that it was imperative the principal became directly involved, along with the appointment of a co-ordinator to implement the gifted programmes. A committee was an absolute requirement to "talk through issues in whole-staff forums, working towards whole-staff consensus, shared vision, and a sense of collective ownership of gifted policy" (Keen, 2004, p. 274). In regards to the large conglomerate of a cluster, Keen had a valid point: "The larger the school, the greater must be the commitment to communication" (2004, p. 274). Thus, Keen believed that the strong ethos of a well-led committee made for efficient co-ordination.

The Ministry of Education endorsed the importance of the co-ordination role of committees. Gifted programmes had more chance of developing and enduring when there was a "team approach" (ERO, 2008, p. 8). In this scenario, the programme was owned by the school community. Therefore, it was not surprising that in the research of Riley et al (2004), eight of the ten case study schools had a committee, as compared to less than fifty percent of the surveyed rural schools. Moon and Rosselli (2000) maintained the role of the committee was as a "broad-based advisory group to address key issues that affect the programme development effort and participate in all aspects of the planning process" (p. 507). Although the literature was scant, the committee was presented as a workable format for the management of gifted education in a school and, thus by association, a cluster.

The literature review brought to light one other interesting feature on management models. There was a sharp focus on leadership and the active relationship between the principal and the co-ordination committee. Apted, Macnee, Court and Riley (2007) found that in their New Zealand study, the importance of the full support

from the school principal was essential to the sustainable success of gifted education initiatives. This finding paralleled Horsley's investigation (2006). Furthermore, the Education Review Office (2008) highlighted the imperative of good leadership. From this evaluation, fifty-eight percent of the schools demonstrated strong support by their principals for gifted education: "Successful leadership was characterised by enthusiasm and good organisational abilities" (p. 10). Correlatively, where the style of leadership was seen as collaborative, the principals built teacher capacity by sharing decision-making and providing senior management opportunities for interested staff. The Education Review Office proposed that this type of "distributive leadership" (p. 40) was a key strategy for effective development of programmes. The case studies from Riley et al. (2004) concurred with this finding, as ninety percent considered the support they received from their principal to be a major factor in enabling them to provide for their gifted and talented.

The examples from the research into committee management emphasised the respondents' desire for an appointed co-ordinator. The literature suggested that this was a reciprocal relationship with two-way needs. A committee required a co-ordinator to put into motion its plans and vision, yet the co-ordinator looked to the committee to make decisions and give direction. An article by Riley (2004) reiterated that it was this ability to liaise which enabled commitment to long-term programme implementation, rather than relying on "quick fixes" (p. 9). A national survey of New Zealand schools showed that seventy-three percent charged a particular staff member person with looking after gifted and talented education, as did ninety percent of the ten case study schools (Riley et al., 2004). Moon and Rosselli (2000) explained that certain aptitudes were beneficial to co-ordinators, such as "the skill in change facilitation, planning, and programme design strategies" (p. 506). Furthermore, "strong change facilitation strategies lead to broad-based support … programme longevity; strong planning and design skills lead to coherent, theoretically sound programmes" (pp. 506-507). The capability to action provided impetus and agency to committee decision-making. Therefore, Moon and Rosselli deemed co-ordination an integral ingredient to the overall quality of provision. Moreover, these theorists advanced the idea that the co-ordinator was in "an ideal position to be the champion for the development of new

gifted programme components" (p. 507). All facets of the literature stressed the importance of the co-ordinator as the indispensible connector for linking the committee management with the facilitation of the actual programme.

3.8   Summary

In the early stages of the literature review, the first superficial look uncovered very little relevant research. Indeed, there was insufficient material to provide a sound base to contextualise this study on the management of a cluster. The paucity of information was further accentuated for overseas sources. Yet a more in-depth probe revealed that there were actually small pieces of evidence. These threads were embedded within publications on topics that were not directly related to this thesis. Such findings, although not comprehensive in detail, did create a more coherent picture to show what was happening in New Zealand gifted education during the TDI timeframe. The literature certainly did describe the challenges faced by gifted and talented children living in rural regions. Correspondingly, the research highlighted their isolation, both in the geographical sense and especially as a personal constraint for self development. The examples of New Zealand-based practice provided a set of indicators for good provision to meet the needs of all gifted and talented students. The research into the Talent Development Initiatives programme demonstrated a deep analysis of the innovative and effective models. The literature showed that leadership through principal involvement on a co-ordination committee could be considered a proven mechanism for sound in-school provision.

Integral to this literature review was the need for closer scrutiny on the principles of collaborative leadership for rural schools. It was this premise which facilitated the investigation of a cluster model. Yet, as the review clearly showed, the term had a plethora of different meanings according to different educational contexts. For clarity and the purpose of this study, the term 'cluster' is defined in this way: The cluster is a group of principals working collaboratively to provide a programme designed to meet the unique needs of the region's gifted and talented students. However, the cluster approach adopted for this thesis was not one that was elaborated upon in the gifted and talented literature, and so, not surprisingly,

there was no research evidence on cluster management. It was a telling and impactful discovery.

This critical finding that there really is no specific literature to benchmark the effectiveness of the cluster management suggests a gap for prospective researchers. The situation in New Zealand provides an opening. The challenge is for this cluster case study to cordon off its "own space" (O'Leary, 2010, p. 81) within this framework and reflect the power of informed research. Thus, this thesis seeks to answer the following research questions:

1. In what ways were a group of schools involved in gifted and talented education managed as a cluster?

2. How effective was this management model as a mechanism to provide for gifted and talented children in a rural region of New Zealand?

3. What was important to the management leaders? How did they view the ethos of their cluster? To what extent was this thinking, this way of being, at the centre holding the cluster together?

CHAPTER FOUR

METHODOLOGY

4.1   Introduction

Authenticity is a goal for all research (Cohen; Manion; & Morrison, 2003). Such an objective means this chapter on the theory and practice of the research design is critical. As confirmation, Clough and Nutbrown recognise the "methodology irradiates the whole of the research" (2002, p. 31) and that at its most elementary, "research is methodology" (2008, p. 1). In its rawest state, methodology is where the researcher 'can get her hands dirty' (Tolich & Davidson, 1999) and shape a framework that will best fit her study. Thus, methodology is a twofold approach. Both the philosophical paradigms and the data tools overarch, and underpin the research process, from conception until critique. Methodology influences, supports, and justifies every aspect of the investigation on every point of the research continuum. Yin concurs: "The chain of evidence is most important" (2009, p. 3) because "without such methodological frankness, we run the risk of reporting 'knowledge that ain't so'" (Clough & Nutbrown, 2002, p. 29). For my study, its significance is accentuated even further. This is because there is the added complication of a conflicted researcher in the incompatible position of being both inquirer and participant; the reviewer and the subject. Furthermore, the methodology needs robustness to justify the evaluative component embedded within the inquiry, because the educational standing of the cluster is at stake. The professional reputations of the principals, the schools, the co-ordinator, and the REINC staff are open to scrutiny. Evaluation requires a strong ethical obligation and a trust in the rigour of the research process. Therefore, ethics anchors this study and infuses the whole methodology.

Ontological world views

Before explaining the methodology, a step back should be taken to look at the philosophical thinking behind research in general. Essentially, it is the basic recognition that "different ways of viewing the world, shape different ways of researching the world" (Crotty, 1998, p. 66). Tolich and Davidson substantiate

this premise: "Whenever we conduct any kind of social research, we are implicitly buying into a particular view of the world" (1999, p. 22). Our ontological viewpoint frames our assumptions about the world as we come to know it. Our place in a social realm colours how we think of research, and influences our choice of approach. Fundamentally, my world view is non-scientific, shaped instead by an education in the arts and humanities. My cultural and intellectual capital steer me in the direction of the qualitative, the interpretive, and the humanistic. Pring outlines his premise that education and research work together for the social good. "Central to educational research, therefore, is the attempt to make sense of the activities, policies and institutions which, through the organisation of learning, help to transform the capacities of people to live a fuller and more distinctively human life" (2000, p. 17). This philosophy of educational research is portrayed as transformational. It is a sound fit for my world view tilted towards championing the rights of gifted children to enhance their well being.

4.2   The qualitative epistemology

This study depicts the human and subjective dimensions of the cluster. As Stake suggests, qualitative researchers can become "guests in the private spaces of the world" (2000, p. 459). It is a bulwark against a quantitative approach and underscores the objectified vision critiqued by Cohen, Manion, and Morrison:

> The more effort, it seems, that researchers put into scientific experimentation in the laboratory by restricting, simplifying, and controlling variables, the more likely they are to end up with a pruned, synthetic version of the whole, a constructed play of puppets in a restricted environment. (2004, p. 19)

This positivist view is in sharp contrast to a New Zealand cluster enlivened with educators, children, and families. Instead the 'slice of life' case study allows the researcher to tap into the vigour of the cluster as experienced by a group of principals. Einstein's quotation offers this homily opposed to judging the world in quantitative terms: "Not everything that can be counted counts and not everything that counts can be counted" (cited in O'Leary, 2010, p. 256). Broadly speaking, this research is classed as qualitative because "there is an emphasis on the processes and meanings that are not rigorously examined, or measured, in terms of quantity, amount, intensity, or frequency" (Guba & Lincoln, 1994, p. 4). Tolich

and Davidson believe that this qualitative epistemology is enabling so "those being researched 'speak through' the researcher in order to gain access to their direct experience" (1999, p. 37). The qualitative researcher is not just a mouthpiece, but a translator of the interpreted meanings for others in their own life-worlds.

4.3   Methodology and method

At this point, there needs to be an explanation on how the terms methodology and method are differentiated and contextualised for a specific purpose. This is because there is ambiguity surrounding these two concepts. For this thesis, Clough and Nutbrown will be the principle source because they offer a very clear definition: "At its simplest, this distinction can be seen in terms of methods as being some of the ingredients of research, whilst methodology provides the reasons for using a particular research recipe" (2002, p. 22). In other words, methodology is the theory that informs the rationale and philosophy grounding the educational research. Meanwhile, the methods are the tools for the practical collection of the data to answer the research questions. Denscombe uses another analogy, and in his lay language, he advises that "good social research is a matter of horses for courses" (2008, p. 3). Basically, approaches are selected because they are appropriate for types of investigation and specific kinds of problems. Fitness for purpose is a key driver for determining the dependability of subjective research. Thus, the methodology for this thesis will be informed by the interpretative paradigm and shaped by a phenomenological approach. The generalised method will be an empirical case study, while the more specific instrument for generating and gathering data will be a focus group interview.

4.4   The research questions

The key tenet underpinning a research question is: "What are we trying to find out here?" (Punch, 2000, p. 16) In this case, there are three areas of investigation to reflect the complex nature of the cluster and how it was managed under its own jurisdiction. Yin asserts that "the more a study contains specific propositions, the more it will stay within reasonable limits" (1994, p. 10). The research questions ask for explicit information on the modus operandi of management, and require some sort of evaluative judgement on the effects of working in this manner. The

last strand is more esoteric in that it seeks to find the 'sense of being' keeping the model together. The research questions are as follows:

Table 3: *The Research Questions*

1. **In what ways were a group of schools involved in gifted and talented education managed as a cluster?**
2. **How effective was this management model as a mechanism to provide for gifted and talented children in a rural region of New Zealand?**
3. **What was important to the management leaders? How did they view the ethos of their cluster? To what extent was this thinking, this way of being, at the centre holding the cluster together?**

4.5   Conceptual framework of methodology

For this thesis, the methodology will take a three-fold approach and separate out into sections. There will be a greater emphasis placed on the focus group method as this was the primary source for generating and gathering data.

Section One: Philosophical Framework

This section will discuss the conceptual framework to explain why interpretivism was chosen as an epistemology and then narrow into exploring phenomenology.

Section Two: Methods

This section will focus on the logic for selecting the method of case study, and the rationale for using the medium of a focus group for gathering the data. Both methods will work in triangulated scrutiny of documentation to verify findings from the data. There will be a subsection to cover the ethics of this research.

Section Three: Generation of Data

This section will look at how the data was sorted, sifted, and examined. There will be discussion on the merits and weaknesses of using a phenomenological approach.

The summary of the structure for the methodology is set down in the table below to show how and where the concept matches the stage of the process.

Table 4: *Conceptual Approach to Methodology*

Methodology/Method/Approach/Technique	Concept
Epistemology	Qualitative & subjective
Paradigm	Interpretivism
Methodology	Phenomenology
Method	Case study
Method	Focus group for gathering data
Approach	Phenomenological thematic data analysis
Mixed Approach	Triangulation
Technique (triangulated)	Document Analysis

SECTION ONE: PHILOSOPHICAL FRAMEWORK

4.6   Interpretivism

Within the qualitative epistemology sits the interpretive paradigm. The central endeavour of interpretivism is to understand the subjective world of human experience from the perceptions of participants. Therefore, in order to glean meaning into their social realm, "one must interpret it" (Schwandt, 1994, p. 118). Denzin suggests that in "the social sciences there is only interpretation [because] nothing speaks for itself" (1994, p. 500). As an argument against positivism, we cannot even establish a fact simply because "a fact is already an interpretation" (Griffiths, 1998, p. 49). Meaning is not just an abstract notion that is haphazardly discovered, but rather "it is constructed" (Crotty, 1998, p. 42). Human beings actively make sense of their world from their stance. Scott and Usher believe that research "involves interpreting the actions of those who are themselves interpreters" (1999. p. 27). Research becomes a filtered way of 'knowing' taking the form of a fluid construct, forever changing according to context and viewpoint. As such, epistemology is presented in a discursive position because "knowledge always involves interpretation within historical and cultural contexts"

(Scott & Usher, 1999, p. 28). Signified is the all-important idea of perspective, which basically frames our way of seeing when we do research (Scott & Usher, 1999). In the memorable words of Clough and Nutbrown: "Research which did not express a more or less distinct perspective on the world would not be research at all: it would have the status of a telephone directory where data are listed without analysis" (2008, p. 10). Interpretation is not only the antithesis to blandness and passiveness, but is a key part of human engagement within a social realm.

From the perspective of New Zealand giftedness, the interpretive concept relates to a world view constructed within a cultural framework, reflective of ethnicity, time, and place (Bevan-Brown, 2004; McAlpine, 2004; Moltzen, 2004). Similarly, the significance of the cluster management is dependent on the position of the viewer, whether this is from inside the group, or from the outside looking in. Denzin presents a valid argument: "Interpretation is a productive process that sets forth the multiple meanings of an event, object, experience, or text. Interpretation is transformative. It illuminates, throws light on experience" (1994, p. 504). Therefore, the choice of the focus group method looks to complement interpretivism, especially in regards to unveiling the values of the leadership culture. The tandem relationship between the interpretivism methodology and the focus group method promises to create and yield "thick interpretations" (Denzin, 1994, p. 506). Out of this process, a text will be produced to tell a 'truth' of the phenomenon (Denzin, 1994). This will be a vignette, a slice of management experience to represent the cluster.

4.7   Phenomenology

Phenomenology is not an easy concept to understand. Contradictions and oppositional views abound within this research orientation. Nonetheless, for all its idiosyncrasies, phenomenology is my choice of philosophical paradigm. Ultimately, the main reason for this decision is my conflicting position as a researcher figuring in her own study. Phenomenology offers a strategy to distance myself from the site and subject of my inquiry. As a philosophy and an approach, phenomenology presents the opportunity for me to disclose my everyday

assumptions and intrinsic bias (Denscombe, 2008, Crotty, 1998). This concept allows me quiet contemplation on the all-familiar cluster world.

Importance of perspective for phenomenology

Phenomenology is a perspective "to study experience from the 'point of view' of the subject" (Crotty, 1998, p. 83), while also seeking to convey authenticity in the flare of a captured life moment. Moreover, phenomenology in this context is related to the human condition from a particular social stance. As an approach, it focuses on the meaning, structure, and essence of the lived importance of 'something' for someone, or some group (Denscombe, 2008). The concept is not primarily concerned with explaining the causes of a situation, but rather explores 'what' it is like to be involved first-hand, in person (Crotty, 1998). Specifically for this study, phenomenology is used to decipher the data relating to the third research question on the philosophical 'being' of working together. In this way, phenomenology will delve into the essence of the cluster as mediated through the lived experience of the principals. Thus, in a dual sense, phenomenology will be asked to do two things for this study: Firstly, to centre on what it was like as a principal 'to be' part of managing a gifted education provision. In the second case, phenomenology will place the researcher on the outside, observing from afar.

Philosophy of the lived experience

From a philosophical stance, it is important to look at the 'being' of experience. The literature signifies that phenomenology is concerned with primal and unmediated existence. In its rudimentary state, phenomenology is centred on the rawness of human emotion. A phenomenon is known through the senses in a pure, unadulterated form (Denscombe, 2008). This is to give a clear picture of the "things themselves" (Crotty, 1998, p. 78), and how it feels in the moments of an immediate situation. Thus, the core of phenomenology is humanistic and concerned with an actual life segment. Van Manen is razor-sharp in his denotation that "lived experience is the starting point and end point of phenomenological research" (1990, p. 36). Therefore, phenomenology seeks to gain a "deeper understanding of the nature or meaning of our everyday experiences" (van Manen, p. 9). This approach is conducive to narrating the thoughts, feelings, and actions of the principals belonging to the Management Group. Phenomenology will be

used to unearth the undiluted meaning of the cluster for the principals as they remembered in retrospection.

Approach of 'bracketing things off'

In order to tone down my subjectivity, I will approach the data from the position of the naïve inquirer. This ploy will follow the phenomenological tradition of 'bracketing things off' (Crotty, 1998; Denscombe, 2008). The technique of separating out prior knowledge should encourage me to become conscious of the world before I 'learned' to see it (Crotty, 1998). This approach should allow me to probe below and beyond my everyday assumptions of the value of the cluster. Phenomenology urges us to engage with experience and to dissect our taken-for-granted understandings so the events speak straight to us. To get to this purity of meaning, Husserl (1931) exalts researchers to set aside personal beliefs framed by their cultural world view. This is Husserl's method of 'epoché' to bracket off and free us from all preconceptions about the world (Cohen et al., 2007). Researchers should employ a "critical methodology" (Crotty, 1998, p. 82) to circumvent their prejudices and see the world anew.

Ontology

As part of the process to bracket off assumptions, the first step will be for me to 'own' my research. This personalising of my study suggests I must identify my perspective in relation to the cluster and its management leaders. This is my ontology. It defines how I come to know; how I come to be (Crotty, 1998). Heidegger (1962) maintains that philosophy is ontology and by the same token, ontology equates to phenomenology (Crotty, 1998). While this is a deep and profound concept, for this study it simply means the place where I made my introduction as the researcher (see pages 4 to 5). This is my "horizon of significance" (Taylor, 1989, cited in Pring, 2000, p. 20). It is a viewpoint to reflect what is important to me. My horizon illuminates me in a series of roles as the researcher, the director and co-ordinator of the cluster, and the mother of a gifted child involved in the early days of the TDI programme. I was a decision-making part of the whole enterprise with my own distinct identity and specialised way of doing.

Reflexivity

Yet within this world of the cluster, my multiple roles competed and collided at times. Primarily, this was because I was the mediator to supervise the programme and to also liaise with the two sides of the cluster partnership. I was the front person for the cluster, but still a staff member of REINC. This was my position of reflexivity where I stood to "reflect on the self, the researcher, the person who did it, the me, or the I" (Wellington, 2000, p. 42). The phenomenological approach suggests a self-reflexive practice and provides the entry point to voice my personal philosophy. Thus, my belief is centred on the power of education to revolutionise lives. In my opinion, education is the most effective tool we have as humans beings to fulfil our hopes and dreams in the pursuit of accomplishment. For gifted children, this ethos is heightened, but with the associated need for stronger support and encouragement. This is my common link to the principals and the basis for a shared vision of gifted and talented education.

Paradoxically, however, it is also the place where my bias as a researcher comes into play. My long term experience with the cluster is both an asset and a disadvantage. While I have informed knowledge on the overall everyday operations, I also have my own preconceived opinions on the worth of the cluster. It is these assumptions that can veer me towards slanting the evaluation in a personal light. There is no impartiality in my perceptions and hence the trustworthiness of my interpretation as the thesis writer must be challenged. In the words of Kamberelis and Dimitriadis: "The notion of an objective and neutral qualitative inquiry has been decentred" (1994, p. 905). The only answer is to acknowledge my prejudice of perspective and to use my reflexivity as a guiding principle. I must consciously unpack my natural preconceptions and then reflect on the impact this may have on the reporting of the research. My horizon of significance then becomes my position of reflexivity.

SECTION TWO: METHODS

4.8   Case study

Fundamentally, a case study is a method for gaining insight into an occurrence and its relevance for those who take part. Merriam notes that a "case study design is employed to gain an in-depth understanding of the situation and the meaning

for those involved. The interest is in process rather than outcomes, in context rather than a specific variable, in discovery rather than confirmation" (1998, p. 19).Therefore, case study is an approach to find out what is important to the participants within a prescribed context (Merriam, 1998). The literature suggests there are many conflicting views. Some theorists take case study to be a methodology with its own philosophy, while others regard it as an instrument of data collection. Bassey advises to "be warned – case study is difficult" (1999, p. 44). Thus, for the purposes of this inquiry, case study will be broadly defined as a 'method' of research. However, to narrow the focus and concur with Merriam (1998), this method will translate to an in-depth study on the significance of a particular situation in a naturalised context.

Social experience

The case study is characteristically empirical in that it is about human experience as lived by the participants of the phenomenon (Stake, 1994). The concern with interaction is supported by the anthropological view that one good case study can illuminate the working of a social system far better than a scientific method of analysis (Stake, 2000). The case study is the medium to examine social processes within the development of a social unit as a whole (Mitchell, 2000). This sociological aspect has the potency to deliver "in depth studies of particular events, circumstances, or situations which offer the prospect of revealing understandings of a kind which might escape broader surveys" (Allison et al., 1996, p. 15). In this sense then, case study is a good choice for small-scale research and is "quite the opposite of any mass study" (Denscombe, 2008, p. 36). Stake comments: "People find in case reports certain insights into the human condition, even while being aware of the atypicality of the case" (1994, p. 456). Such a close up can delve into the power of a real-life situation so that a "case study is an intensive, holistic description and analysis of a single instance, phenomenon, or social unit" (Merriam, 1998, p. 27). Therefore, in regard to Merriam's sound explanation, the focus on the cluster can be presented in these three ways: The cluster is an example of a TDI project; a collaborative provision for gifted and talented students; and a management group of principals supervising a programme. There is an overall sense of all the parts interconnecting to make a whole. The small and the specific are the best match for this method;

hence, the cluster is a good fit for a case study approach to a confined social context.

An example, not a sample

From the methodological perspective, the case study of the cluster will be looked at for its possible uniqueness. As a phenomenon, it is set within a bounded system (Stake, 2000). In this context, the case is finite constellation of nine schools in a specific rural region of New Zealand over a set period from 2003 to 2008. The closed nature of a case means that the subjects making up the single social unit are distinguished from those not included:

> A case study is a detailed study of a single social unit. The social unit is usually located in one physical place, the people making up the social unit being differentiated from others who are not part of it. In short, the unit has clear boundaries which make it easy to identify. (Payne & Payne, 2004, p. 37)

The case study is localised in context and specialised in nature. Hence, for this thesis, the case will be an "example, not a sample" (Payne & Payne, 2004, p. 31). The key characteristic will be its specialness as a stand-alone phenomenon, rather than its ability to be replicated to other circumstances. In other words, generalisation will not be a feature. Gomm et al. highlight the rarity of the situation, which exemplifies the cluster: "The aim of case study research should be to capture cases in their uniqueness, rather than use them for wider generalisations or for theoretical inference of some kind" (Gomm; Hammersley; & Foster, 2000, p. 2). The strength of case study is its ability to explain the peculiarity of a situation, but still circumscribe the events and interrelationships that shape the whole. Stake reinforces: "The purpose of a case study is not to represent the world, but to represent the case" (1994, p. 460). Credibility is not due to the expansiveness of the case, but the power of the data to describe, explain, interpret, and evaluate the richness of the phenomenon itself (Cohen; Manion; & Morrison, 2007). This is the illumination of the particular to learn from a single instance. Importantly, Yin believes that a case study answers the explanatory 'how' and 'why' research questions, especially as to "whether a programme had worked or not" (2008, p. 10). Case study is therefore a versatile mechanism for explaining a unique cluster world.

4.9 Ethics

The ethical considerations were critical to this research and thus influenced the overall design of the methodology. O'Leary advocates that "absolutely central to research integrity is ethics" (2010, p. 40). Therefore, at the centre of the underlining principles for this thesis are two aspects: the qualitative nature of a case study, and the human dynamics of a focus group. It was, at times, a tricky part of the methodology. "As a researcher, you have an explicit and fundamental responsibility towards the 'researched'" (O'Leary, 2010, p. 40). The subjectivity implicit within the character of the cluster had a powerful bearing on the need to formulate a safety net to protect all participants. This human element was accentuated further with the bipartisan relationship between the Management Group principals and the REINC staff. The individual reputations of personnel required safeguarding at all costs, as did the professional standing of their schools and the cluster entity. There was a constant and real risk of character denigration in a public domain. As Snook points out: "Ethics requires that humans must never be treated as a means to someone's ends: they must be seen as 'ends in themselves' … it is illegitimate to treat human beings as if they were passive objects" (2003, p. 157). The command for all researchers to heed is to 'do no harm' (Bell, 1999; Snook, 2003). Furthermore, Snook phrases this moral principle in the optimistic belief that "research is to improve the situation of human beings" (2003, p. 158). To this end, the researcher's obligation is to take the utmost care and exercise great caution. Stronach and MacLure concur and believe research should be about "making a life, rather than taking a life" (1997, p. 35).

Ethical concerns

This study exposed one central problem to the entire data collection process. The role of the researcher was a site of possible conflict due to her three positions as a cluster co-ordinator; REINC employee; and professional colleague. The Massey University Code of Ethics (MUHEC) clearly stipulates that a conflict of interests should be handled most carefully:

> Generally, applicants must avoid any project that puts them in a position where their activities as a researcher might come in conflict with interests as a professional. Applicants must explain the nature of any potential, and what

> actions they propose to minimise, avoid, or resolve the conflict. (2009, p. 12)

This loss of objectivity, due to the closeness to the subjects, posed a personal predicament for me. Thus, this ethical issue determined the necessity for a systematic and transparent approach to the entire research design.

In adherence with the regulations of the Code of Ethical Conduct prescribed by Massey University (2009), a thorough appraisal of the prospective methodology was made at the onset of the study. The protocol dictated a proactive, problem solving approach to the ethics application. This method involved much planning to negotiate foreseeable issues. Clarity of forethought was essential and echoed Bell's advice: "The researcher should, ideally, anticipate every possible side-effect of his [sic] procedures and guard against them" (Bell, p. 40). In practice, the exercise was invaluable. The stringency of requirements not only made me think ahead to side-step obstacles, but also to reflect on the viability of my whole approach. As such, the ethical process proved a catalyst for the justification of my methodology. This resulted in the authorisation of formal approval from MUHEC on 30 April, 2010 (see Appendix i).

A checklist of ethical measures

The ethical safety mechanisms put in place for this research included these most critical features:

- The cluster was not named, nor the region identified;
- The participants chose their own pseudonym and their associated schools were known only by their school colours;
- Outside educational advisors were not named. They were referred to only by their professional title;
- The external co-ordination and administration organisation went under a nom de plume;
- The personnel of the REINC organisation were referred to only by their professional titles;
- An information letter of 'Informed Consent' was sent to the prospective participants outlining the intention and process of the research. A self

addressed envelope was included for easy return to the researcher (see Appendix ii);

- Letters were sent to the school's Boards of Trustees seeking approval for the principal or deputy principal to be part of the research;

- A letter was sent to the Management Group requesting access to the records on file;

- A letter was sent to the REINC Board seeking permission to access to the contractual documentation;

- A Consent Form was signed by each respondent, in agreement with the terms of participation, and sent to the researcher before the due date of the focus group; (see Appendix iii)

- An independent facilitator was hired to act as the proxy interviewer at the focus group; and

- The three auxiliary personnel (the facilitator, the transcriber, and the sound technician) were asked to sign confidentiality forms.

In sum, the ethics proved to be a most determining part of the methodology. The rigour required to fulfil the MUHEC regulations was premised on the absolute importance of safeguarding all the participants. Such a high level of confidentiality resulted in the non-identification of the region, the cluster, the schools, the management leaders, and the facilitation organisation. Anonymity was decreed to be the safest form of protection for the participants of this qualitative case study.

SECTION THREE: GENERATION OF DATA

4.10   Phenomenological data

The structure of the three research questions is loosely based on phenomenology's 'bracketing off' concept. In this context, the term phenomenology is used as the process to discard data through a reductionist approach. As a method, this can be likened to peeling an onion. It involves the unravelling of layers of meaning to expose what really matters at the centre of the phenomenon. On this basis, the three layers correspond to each research question with a graduating depth of inquiry. The outer rim signifies the first question, which is the most general because it asks the participants to consider the ways the cluster was managed. The

mid-section matches the second question on the perceptions of effectiveness. This area delves deeper into the management model to decide whether the participants thought it a workable strategy. The third question epitomises a true phenomenological approach. The inner core concentrates on the essence of the cluster experience. This is the possible state of 'existential being.' Consequently, due to its cryptic nature, a pragmatic strategy will be used to help nullify the subjectivity. This will take the form of an attempt to triangulate the data to a limited degree. To this end, documentation from the TDI contract will be an extra prong of evidence to bolster findings.

4.11   Triangulation

For a study to stand up to close scrutiny, it must be sufficiently robust to defend itself against the challenge of critique. The critical reader needs to feel confident that an investigation has been undertaken with due diligence. Ultimately, if a piece of research is deemed invalid, "then it is worthless" (Cohen; Manion; & Morrison, 2003, p. 106). This is especially important for the reliability of research which is premised on a subjective quotient. In the context of a focus group medium, the notion of qualitative takes on a more enhanced meaning because of the variety of voices within the interview situation. Multiple participants equate to multiple interpretations of the same phenomenon. There is no one single 'truth' as all versions are contestable. Cohen et al. believe that "exclusive reliance on one method, therefore, may bias or distort the researcher's picture of the particular slice of reality being investigated" (2003, p. 141). It is especially notable when "a researcher is engaged in case study" (Cohen et al., 2007, p.143). The focus group situated within the cluster case study is therefore doubly at risk of an interpretive form of distortion. This is due to the inter-subjectivity between the participants' meaning attached to their responses, and the inferences taken by the researcher as the translator of the data. Hence, to provide added rigour, the technique of triangulation is used for the group interview to "safeguard the charge levelled against qualitative researchers, viz. that they respond only to the loudest bangs or the brightest lights" (Cohen et al. 2003, p. 120). Such a claim is particularly relevant for a subjective researcher studying her cluster peers.

For this thesis, triangulation was undertaken "using more than one source of data to confirm the authenticity of each source" (O'Leary, 2010, p. 115). One

limitation, however, must be considered. Triangulation in this context does not take the form of a separate stream of information collated from an independent method. It is not very scientific in this case, or an example of mixed methods research (Denscombe, 2008). For example, it does not apply to the quantitative nature of a survey. Rather, triangulation is more arbitrary and "is used in a metaphorical sense" (Denscombe, 2008, p. 135). It is an added tool, in the guise of a semi-formal technique, to give another standpoint to judge the comments of the participants. Thus, the justification for employing an additional viewpoint concurs with Denscombe's theory: "Triangulation involves the practice of viewing things from more than one perspective … the researcher can get a better understanding of the thing that is being investigated if she views it from different positions" (Denscombe, 2008, p. 134). In other words, triangulation offers another strategy to ground the meaning from the responses and "enhance the validity of the data" (Denscombe, 2008, p. 138).

Subsequently, the small-scale strategy took the form of an examination of the documentation from the cluster's archives. In this way, triangulation provided a written alternative to balance the oral dimension of the focus group. The cluster records were treated as a "source of data in their own right" (Denscombe, 2008, p. 227). Namely, the documentation consisted of milestone reports to the Ministry, official feedback, meeting minutes, application proposals, and an evaluation of the cluster's journey in the first TDI round. Furthermore, it took concerted effort to meet the ethical requirements from MUHEC to access the TDI contractual information. As seen in the checklist for ethics (see pages 58-59), permission was formally sought from both the Management Group and the REINC Board for this documentation. In terms of methodology, the use of the archival records was not a perfect form of triangulation. Nevertheless, given the need for greater objectivity, it was one of the few viable options that could be easily tapped into. From this angle, the documentation did prove to be a reliable source to give weight to the data and support what the principals had to say. This heightened credibility was especially visible in the Background chapter and was also important for substantiating the final discussion on the research implications. Hence, as a research technique, triangulation was successful, not as a separate method for data collection, but as an additional source of evidence to ground findings. The

supplementary perspective did fit with a phenomenological approach in that it added a detached stance from which to evaluate the data and to soften the authorial voice of the thesis writer. It is fair to say that triangulation, to a limited degree, did provide a sense of distance to authenticate findings and establish trustworthiness of the study, whilst also reducing the researcher bias.

4.12   Focus group

There was one specific reason for the choice of the focus group to gather the data. This was simply because the forum of a focus group looked to reflect the way the Management Committee had worked over the six years of the TDI project. Bloor et al. summarise the visibility of interactive dynamics: "Where groups are composed of members drawn from pre-existing social groups, it is both inevitable and desirable that the group interactions in the focus group reflect the group interactions in the pre-existing group" (Bloor; Frankland; Thomas; & Robson, 2001, p. 50). The tradition of collaboration was believed to be a solid argument for replicating the management experience. However, one proviso should be noted in attempt at self reflexivity. This decision for choosing the forum group as a methodological device was made on the actual experience of the researcher as a cluster participant.

Theory behind the focus group

The literature indicated that there were distinct advantages to using the focus group as a mechanism for data production. In a general sense, Fontana and Frey postulate that "interviewing is one of the most common and most powerful ways we use to try to understand our fellow human beings" (1994, p. 361). O'Leary defines this as "a method of data collection that involves researchers seeking open-ended answers related to a number of questions, topic areas, or themes" (2010, p. 194). In consideration of the need to ensure authenticity to the focus group, the management setting was reproduced as much as possible. This involved some considerable effort on my part as the distanced researcher. For instance, the regular format of a cluster meeting was followed to give familiarity to the situation. To further duplicate the proceedings, refreshments were offered as was the practice in the past. The venue was situated off-site from the usual meeting place to address the ethical priority for impartiality and confidentiality.

Lastly, the careful choice surroundings exuded an ambience conducive to finding out "what the participants think, [and] why they think the way they do" (Denscombe, 2008, p. 179).

Ethical strategy for the focus group

The disclosure of insider knowledge posed an unavoidable but overriding consideration for the focus group forum. It was my implicit conflict of interests. Critically, in a bid to ameliorate my blatant bias, an independent interviewer was employed to facilitate the focus group. This person was a social researcher of standing within New Zealand academia and held a doctorate qualification. The predetermined role of the facilitator was crucial to the success or failure of the interview, and hence the quality of data generated. Ideally, the facilitation style required considerable ability to moderate an unknown group of colleagues well-accustomed to working together. Bloor et al. believe the facilitator should not overturn these natural features of group structure or relationships. Indeed, it is important to allow the meanings, processes, and norms to surface: "The focus group is meant to be tapping into group life, not changing it" (Bloor et al. 2001, p. 50). This has ready application for the cluster model, as intervention would have stifled the interplay of the dialogue and the tone of the discussion. In order to ensure the interview flowed, the compilation of an agenda provided a set structure with a specific question schedule (see Appendix iv). Furthermore, the facilitator was well briefed in advance. The Background chapter was available to read prior to the focus group and two meetings were organised with the researcher to fill in the details necessary for a smooth interview.

For all the forward planning, the key problem for the non-present analyser was still the distance from the dialogue. The data from the verbal interchange was related second-hand via the transcript. Due to my exclusion from the focus group, the utmost care was taken to ensure nothing went wrong at the primary source for data collection. As insurance, the entire interview was digitally recorded using three tape recorders set up by a sound technician. In adherence to my ethics application, I was not permitted to listen to the digital recording. This resulted, unsurprisingly, in a heavy reliance on the precision of the transcribed text. Hence, a school secretary, with a sound background in the operation of the cluster,

transcribed the data. In all, the outcomes from focus group greatly depended on the skills of the proxy interviewer, the accuracy of the transcription, and the wherewithal of the researcher to pre-empt the ethical problems.

4.13 The focus group as a mechanism to generate data

Conclusively, the focus group offered a sound opportunity to look at the philosophical essence of the cluster and to find out the attitudinal thinking of the participants. In this context, the focus group worked as a very good platform to make sense of the cluster world as described and mediated through the perceptions of the management leaders. The formatting device of the itemised agenda structure allowed the research questions to be answered fully and candidly. Indeed, the data was most forthcoming. Testament to the success of the focus group, the interview yielded forty-four pages of transcript over two and a quarter hours. However, an arbitrary risk factor came to light. It was due to the ethical implication arising from the researcher reporting on a self-involved project. As a result of the second research question, with was its singular focus on the management model's effectiveness, there was the understanding of an evaluation on the whole provision. Massey University's Code of Ethics covered this contingency with the requirement to this compliance: "Any evaluation of organisational practices or teaching information where information of a personal nature may be collected, where participants may be identified, or where the performance of staff may be commented on" (2009, p. 3). This statement implies the pivotal ethic again of 'do no harm.' In this case, it applies to the professional reputation of the researcher. The employment of a neutral facilitator and the strident confidentiality clause were the two mechanisms put into practice to protect me.

Composition of the focus group

On the focus group day, 23rd July 2010, six out of the possible ten school leaders attended the interview. The four non-present principals sent their formal apologies and reasons in advance for their absence. Two principals were overseas at this time. The other two participants indicated they would be there, but due to unforeseen circumstances (sudden illness and an urgent school matter), they did not make the forum. All ten respondents returned their Focus Group consent

forms to the researcher prior to the actual interview. The commencement time of mid-afternoon on a Friday was possibly not conducive to a full turn-out, but this was unavoidable due to the difficulty in finding a date suitable to all principals. Moreover, one participant had to leave early for a prior family commitment and departed before the focus on the research questions relating to evaluation and ethos.

As the last step in the methodology, the full transcript was posted out to each respondent with a covering letter. This informed of the respondents' rights to edit or clarify their own dialogue, if they wished. No amendments were returned so the assumption was that all participants accepted their text as true and accurate. This was a 'member check' in lieu of the participants coming together for a final confirmation of the data. A critical point is that no follow up process was undertaken with those unable to attend the focus group. Foremost, this was due to the time consideration. The organisation of the focus group had proved problematic due to co-ordinating the variables of ten participants and an interview facilitator. Furthermore, there was the additional difficulty of physically reconvening a second interview. One founding principal had relocated to a distant region, and two other leaders were on overseas sabbaticals in the post-interview phase. In a pursuit of robust methodology, there was always the option to send out the question schedule for written comment. However, as the researcher, I had premised the focus group on the replication of the cluster management meeting and its underlying group dynamics. Hence, I believed that a new focus on individuality at this late stage would have detracted from the notion of collectivism for data production.

A phenomenological approach to data analysis

While the phenomenological approach to bracket off preconceptions and lessen writer bias appeared advisable, there was a stumbling block. Very little literature could be found to explain, in a plain fashion, how to go about handling the actual data. There was a gap in the research base for material to logically describe how to make sense of the data. Two phenomenology theorists, Moustakas (1994) and van Manen (1990), concur that a thematic approach was a suitable strategy to reduce verbal responses into related chunks of meaning. Basically, this theory

suggests that data is broken down into subject strands, and then sorted into subsets of convergent or divergent opinions. It is a stratified method of phases corresponding to the topic headings that underpin the research questions. The step-by-step structure is comprised of five stages. It is premised on a modern phenomenological study (Groenewald, 2004), and offered as a structure for data analysis by Blaxter, Hughes, and Tight (2008):

1. "Bracketing and phenomenological reduction;
2. Delineating units of meaning;
3. Clustering of units of meaning to form themes;
4. Summarising each interview – validating and modifying; and
5. Extracting general and unique themes from the interview to make a composite summary" (p. 211).

Structure for data collection

In correlation with the formula suggested by Baxter et al. (2008), the data analysis for my thesis used this phenomenological approach. It resulted in two phases for working with the data. As a reflexive researcher, I needed to 'bracket off' (Crotty, 1998; Denscombe, 2008) my assumptions to interpret the literal meaning of the responses. For the first stage, I resolved to look anew as a stranger and a naïve inquirer. This contrivance did work to give a sense of freshness to the data and to only review the responses, literally, through the mouthpiece of the speaker. The second reductionist phase was designed to peel back layers of data and remove irrelevant material to find the 'truth' in the centre. The separating out of preconceptions was extremely difficult to do, because the meanings were layered and linked. The constant interjections were problematic for segregating opinions and aligning thinking to one person. Nothing was neat and tidy; all was messy and intertwined.

However, with perseverance, I eventually ended up with blocks of common meaning under topic headings. The process of handling the data was quite methodical. The categories and themes arising from the text were matched up to my research questions, then cut out, and pasted onto coded coloured cards. This coding system was a laborious task, but it made for ready cross-referencing and a deep understanding of the text. The act of writing several drafts for the results

worked to discard extraneous material and to get to the heart of what really mattered to the participants. Each draft was a more refined clarification resulting in a descriptive and explanatory narration of meaning. "It brings out, and refines, as when butter is clarified, the meanings that can be sifted from a text, an object, or a slice of experience" (Denzin, 1994, p. 504). Perhaps the strongest outcome from this phenomenological approach was to gain a sense of distanced perspective and the essential 'gist' of what was important to the management leaders.

In summary, the table below is a brief evaluation of the phenomenological process for data analysis is aligned with the structure recommended by Blaxter et al. (2008).

Table 5: *Phenomenological Method for Data Analysis*

Step	Process for focus group data	Evaluation	Next time Yes/No
1.	Bracketing & phenomenological reduction	Helped to give an aspect of distance to researcher by close examination of biased assumptions around cluster. Assisted in discarding some material & uncovering core meaning.	*Yes*
2.	Delineating units of meaning	Concepts & issues differentiated – some overlapping of points.	*Yes*
3.	Extracting general & unique themes from the interviews to make a composite summary	Blocks of meaning easily sorted into themes.	*Yes*
4.	Summarising participant's input – validating & modifying	Participant's contribution measured quantitatively by number of times contributed, interjected, & lines of speech – not summarised into précis. Only applicable for group dynamics.	*No*
5.	Extracting general & unique themes from the interviews to	Took the form of repeat & refined drafts for the	*Yes*

	make a composite summary	Results chapter. Good form of reducing the data to get to the crux of meaning for participants.	

Thus, the structure to systematically reduce the data was successful in peeling back the strands of dialogue to uncover the quintessential meaning attributed to the cluster.

4.14   Summary

The methodology was the backbone to this research and at all times reflected the imperative need to conduct the inquiry within a stringent ethical framework. The implications from the ever-present conflict of interests permeated the intentions, the decisions, and the pathways for this qualitative study. As a means to summarise the complexity of the methodology, the table below gives an evaluation of the applicability of the chosen method.

Table 6: *An Evaluation of the Methodology, Method, or Technique*

Methodology/method	*Evaluation of approach*	*Recommendation for future*
Phenomenology	Highly applicable both in philosophy & type of approach. Drafts for writing & a thematic approach reduced data to manageable proportions.	Deeper research into the process of phenomenological analysis of the data.
Reflexivity	Applicable, but more as awareness, rather than a visible strategy.	Further reading to find out how reflexivity could look in practice.
Case study	Applicable but limited due to paucity of comparable NZ models. Difficult to separate out the cluster operations from the actual management practice.	Case study a good source of thick, qualitative data. Strong focus on 'lived experience' a good fit with phenomenology.
Focus group	Highly applicable – an excellent method for gathering data from a pre-	Ensure that a follow up 'Member Check' is organised well in

	existing group.	advance to confirm data.
Triangulation (documentation analysis)	Relevant for adding another perspective. Used to reinforce points made by participants or to prioritise elements in the background chapter.	If appropriate, a discourse analysis would be enlightening to show power relationships & ideologies. Very compatible with an interpretive paradigm.

Overall, it is fair to say that the methodology was applicable and relevant to this qualitative study premised on the interpretive paradigm. Specifically, the case study was characterised by uniqueness of the example, rather than typicality of a situation. Furthermore, this method complemented the phenomenological approach and unveiled the humanness of the cluster ethos. As a mechanism, the choice of the focus group proved a valuable means for data generation. The participants relaxed and noted the implicit sense of familiarity in working together in this way. HB remarked that "the discussion flowed – that's how our meetings went" (p. 44). Chebz also confirmed the common collegiality of the cluster meeting and the focus group: "It's good doing it like this. We've bounced off one another. This is how our meetings used to go, too" (p. 44). Therefore, the focus group did replicate the management model; there was a synchronicity to the proceedings so that all participants were fully engaged. The data yielded was informative and enlightening to the ways, performance, and ethos of the Management Group. Hence, in this sense, the tactical decision to reduce research bias by employing an impartial facilitator was fully justified and highly effective.

In relation to the application of another method, the triangulation with the documentation for the cluster was not used to a huge extent. Although a little limited in scope, this extra source did support the Background chapter and bolster the discussion of the themes arising from the data. The phenomenological approach was deemed successful in peeling back the layers of meaning and reducing the data into themes of coherency. Additionally, the process of bracketing off assumptions did work to a limited degree, if only to give some sense of distance to the data. However, the compromised nature of the researcher was never fully resolved, so in this context, phenomenology was perhaps more apt

as a theory than a reality. This may relate more to the nature of the conflicted role than the paradigm of practice. Indeed, it is perhaps far better to endorse the words of Wellington and simply just acknowledge the researcher's "healthy bias" (2000, p. 42). To summarise, the methodology did provide a secluded space for the principals' voices to be heard and their personal perceptions to shine through. In this light, the methodology fulfilled the researcher's expectations and imbued the study with an iridescent authenticity.

CHAPTER FIVE

RESULTS

5.1   Introduction

The basic aim of this chapter is to tell the principals' story in their words so that their perceptions are given credence and life. As the researcher, the aspiration is to make sense of the data and inscribe meaning to the lived experience of cluster leadership. In this light, the focus group interview is premised on my research questions and supports the notion that "qualitative research 'tells a story' from the viewpoint of the participants that provides rich detail" (Roberts, 2004, p. 113). Therefore, the ideal situation to listen to the respondents' voices is to make a separate space for "letting the actors speak for themselves" (Tolich & Davidson, 1999, p. 60). However, there is implicit another reason for this undiluted depiction as a vignette of shared management practice. This is the endeavour to take the researcher out of the case study as much as is possible so that the bias does not impede or constrain the participants' freedom of speech.

There are several clarifications to be made before the presentation of the results from this subjective research. As a consequence of the predominant focus on participant voice in this study, the results will be presented in a largely descriptive style without deep analytical interpretation. The graphic narration is grounded on the individual opinions and attitudes of the principals in relation to their group management role. Furthermore, it must be kept in mind that the analyser was not present at the actual focus group. All the data is relayed through the interview of the external facilitator, and then transcribed into text without audio support to reinforce the nuances of the dialogue. The data is a raw transcript without the colour and the richness that comes with the presence of an interviewer. It is also important to note that the research is from a management position only. No other viewpoints were sought to balance or contest what the school leaders have to say. Such an approach is underpinned by the "philosophical orientation of phenomenology, which focuses on people's experience from their perspective"

(Roberts, 2004, p. 111). Common perceptions may serve to express a collective point of view within this cluster case study.

As part of the thesis structure, the perceptions are analysed in broad thematic strands. The results are organised into three sections corresponding to the research questions. The first section introduces the rationale behind how the cluster and management model came to be modes of provision, and the ways in which the cluster was managed. Section Two examines the perceived effectiveness of the Management Group.[6] The last section seeks to explain the "primordial phenomenon" (Crotty, 1998, p. 79) and highlights the essential ingredients for the ethos anchoring the principals' way of working.

5.2 The research questions

To reiterate and for ease of reference, these are the key research questions for generation of data through the focus group medium:

1. **In what ways were a group of schools involved in gifted and talented education managed as a cluster?**
2. **How effective was this management model as a mechanism to provide for gifted and talented children in a rural region of New Zealand?**
3. **What was important to the management leaders? How did they view the ethos of their cluster? To what extent was this thinking, this way of being, at the centre holding the cluster together?**

5.3 The focus group

The focus group consisted of six participants. These school leaders represented a sixty percent response rate from the sample of ten management leaders[7] for the nine primary schools belonging to the Management Group, in 2007 to 2008.[8] To

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[6] The term "Management Group" is used interchangeably with "Management Committee" by the principals.
[7] Although the TDI Cluster was comprised of nine schools, one large school sent two representatives (the principal and the gifted and talented co-ordinator) to management meetings. Hence, there were ten regular members on the Management Committee.
[8] For the purposes of this chapter, the six participants will be referred to using the interchangeable terms of "principals" or "school leaders."

protect identity and provide confidentiality, each participant and school had individual pseudonyms, as seen on the next page.

Table 7: *List of Focus Group Participants and their Schools*

Pseudonym of Participant	Pseudonym of Participant's School (School Colours)
HB	Blue
Hunta	Black and White
Chebz	Yellow and Black
Anaru	Bottle Green
Babe	Red and White
Junior	Orange

Overview of linguistic features within the data

The focus group yielded forty-four pages of typed script from the two and a quarter hour interview. The following characteristics in the data transcript were noted by the researcher:

- There was evidence of three dominant voices with noticeably greater speech input, as compared to two interviewees who responded far fewer times with much less content;

- This higher contribution may imply the existence of learned 'court knowledge' on the subject of the cluster by long-term management members, or the presence of 'clan' structure for social interaction; and

- The third major linguistic feature was the familiarity with which the participants interrelated with each other. On many occasions, one would finish the sentence for another, or frequently and freely interject. Such spontaneity gave the sense that this was the way this group naturally functioned in normal circumstances.

The tone of the data

From a researcher's perspective, the data from the Focus Group encapsulated a feeling of dynamism around the cluster as suggested by the fast and furious nature of the whole process. At times, the script crackled with the alacrity of their responses. There was an effervescent energy and clear sense of easiness between all members: "We zinged into one another" (Chebz, p. 42). They started politely, became more relaxed; then interrupted, jested, and laughed together. "We'd go

away with tasks to do. Hunta would be organising pig hunting (giggles) … skinning possums" (HB, p. 26). The voices were dominant, and assertive; yet respectful and considerate. Junior, the youngest and newest member, saw the cluster as "a welcoming place" (p. 22). From the text, it was plain to see the experience and knowledge of the group as suggested by Hunta. "Some very good practices developed out of it, didn't they?" (p. 41). There were many examples to show how they interacted together. For instance: "If it was hard to make decisions, we laughed at each other ... we cracked up laughing at ourselves (HB, p. 34). Therefore, for the researcher exploring the data, it was not just hearing the voices. Instead, it was more about understanding their thinking and listening for the emotional resonance behind what they had to say.

SECTION ONE

The first research question to analyse the data for the presentation of the results:

5.4 In what ways were a group of schools involved in gifted and talented education managed as a cluster?

Origins of the cluster

At the beginning of the transcript much of the data was centred on the rationale for coming together to form a cluster. Initially, the responses seemed tentative with some hesitancy and a lack of preciseness in the answers. However, one feature clearly identified was that a prime driver for establishing a cluster of schools was the new Government policy direction set in the early 2000's.

> It was back in the days of contestable funding … there was a meeting, um, about gifted and talented education, ah at "Red and White" School … it was about people who wanted to attend and find about that and put in an application. So basically the cluster grew out of the people that went to that meeting – must have been August 2002 … The first TDI Director might have called the meeting - from REINC. (HB, p. 2)

The first meeting proved a defining point for instigating the cluster as a multiple-school prospect for a Talent Development Initiative. Although no reference was made to specific priorities at that time, four leaders recognised the different needs of their outstanding students and had catered for them in some form.

> There'd been a booklet come out from the Ministry. It might have been called 'Children with Special Interests and Abilities.' It had a blue cover. So I guess in education around that time, gifted and talented was probably a government interest area and there was a lot of discussion around it. (HB, p. 4)

Hunta likened this Ministry offer of additional monies to a monitored fund. It was where someone else was in the driving seat, but giving schools the incentive to come up with "a plan to actually get the thing going" (p. 4). Chebz remarked that so much of the resources in schools were given to students of special needs, which meant there was no allocated funding for the children at the other end of the spectrum with special abilities (p. 4). Moreover, Chebz viewed this prospect for contestable funding as an equity issue and this "was a huge opportunity to be able to get programmes in place for these children – because you need money" (p. 4). The chance of outside financial support was an impetus to join forces and work in a confederation: "Clustering was the way we could do the best for those children" (Anaru, p. 9). This motivation for improving student outcomes was the compulsion for setting up a coalition. "We knew that we could do better" (Chebz, p. 9) was a phrase repeated on several occasions throughout the interview.

A pilot cluster

The contestable pool was seen as an enabler with immense benefits for their brightest and most promising children. In the period just prior to the TDI scheme, schools had a heightened awareness on gifted and talented education. HB recalled that: "Most of us were doing some sort of internal streaming in our schools and that would have been our strongest argument around that time for meeting the needs of the brighter kids" (p. 7). The principals believed that a key reason their TDI proposal had merit was because they already had in place a structure to support their gifted and talented students. In the early 2000's, two schools had created an informal programme bringing talented children together to work with teachers who had expertise in a certain area "for extension and enrichment" (Chebz, p. 2). 'Black and white' school was invited into this mix to become a triad system of "rural schools with urban schools" (Hunta, p. 2). HB signified the relevance of this pre-established baseline to underpin their submission to Ministry:

When we put that application in, we had done a lot of the documentation that was needed, which was beneficial to the cluster. And the fact that we'd already done something ourselves, by ourselves, beforehand, probably went in our favour as well, when we won that first contract. (HB, p. 2)

Thus, the pilot programme provided a rudimentary type template to move out from. The miniature cluster was a concrete example of an historical way of working.

The uniqueness of the region

The second primary factor emphasised in the TDI proposal was the uniqueness of the region including the geographical location of the schools. HB and Chebz together defined this issue as "obviously our isolation" (p. 6). All participants agreed that the poor access to advantages offered by large New Zealand cities hindered their provision for gifted students. Hunta, a principal of a remote and small school, propounded that the only option available was to look to the Correspondence School for extension activities. However, on the flipside, Anaru summed up this obstacle of isolation in a more positive light and as a remarkable point of difference:

We had an opportunity because of the uniqueness of where we were, in that we could combine rural schools with urban schools. And that's something the cities, couldn't really do. There were four country schools and five city schools in the cluster working together - that would be something exclusive. (p. 7)

Chebz also pinpointed the region's tradition of community-mindedness. Remoteness "made for a very tight community where everybody knows each other … the Principals' Association was very active then … You all got on. Everybody contributed." (p. 7). The participants perceived collaboration to be a powerful tool for getting around the hurdle of remoteness. The dictates of rurality could be sidestepped by schools using the mechanism of a cluster. Chebz affirmed that: "You see the power of clustering rather than working by yourself" (p. 8). This was an important statement because it reflected the common thinking of the group throughout the entire interview. There was much evidence of this

reoccurring emphasis on the strength of working together, rather than individually as separate schools. It was a constant and visible theme.

The partnership with REINC

The application to the Ministry was submitted on behalf of the interested schools by the REINC Manager and two principals (p. 20). Upon its acceptance, the consortium created its own particular way of running the Cluster TDI. The management model, as a modus operandi, therefore started at the same time the TDI project began. The formal collaboration came about in the first instance because the principals decided to lead and steer the provision: "You guys made a conscious decision as principals to drive it … be active and meet regularly" (Chebz, p. 20). The data conveyed that the principals did not want a repeat of their previous experience as an "ICT group, where the Project Manager was like God Almighty who told us what to do and what we should be doing – we didn't like that aspect of the contract" (Chebz, p. 21). All three respondents were resolute that their schools had not signed up for this segregated approach with the principals having little input or control over the proceedings. Instead, they wanted the authority to supervise the contract, yet work with an outside institution that would micro-manage the systems for the running of the project on their behalf. This reversal in the mode of operation changed the authoritative framework to make sure the "Management Committee was up here … REINC held the money there, but we used REINC resources to run the contract – Co-ordinator. So it was the other way around" (HB, p. 21). This structure "was one of the requirements of the contract" (HB, p. 20). The management leaders believed their responsibility was to work as a collective to oversee the entire provision. "We managed and directed the funds where we wanted" (Hunta, p.11). The leadership team shared its contractual duties with the external organisation REINC, its partner for facilitation and administration.

The data showed that the outside organisation, REINC, was inextricably connected to the Management Committee on all levels of operation. This included the policy-making in the meeting forum, alongside the day-to-day communication and programme organisation. From the dialogue, the participants' viewpoint was that REINC was charged with the overall co-ordination and implementation of the

provision. This included the mandatory liaison and reporting to the Ministry. While the Management Committee was seen as the decision-making body, the transformational part of the process was handed over to REINC, the action-maker. Babe noted that REINC was "more in an administrator's role" (p. 21). In a democratic way, they were partners because "REINC had the same voice as any us who were there" (HB, p. 24). There was apparent a bond of reciprocity where one needed the other to fulfil the obligations of the TDI contract, thus evolving into a conjoint way of working.

The role of professional development

Professional development was mentioned by the participants on many occasions. This reference was made in the sense that "PD"[9] was considered a determinant for growing their collective knowledge as a cluster, and impacting on their role of management. It was a theme which constantly reappeared, and took on the role of a connector in the text to link strands relating to the management's choice of programme. This joint approach to provision was marked by a complementary development. Around the time of the cluster inception, a university-based Gifted and Talented Education Advisor was working in the region and facilitating professional development courses for educators. Her effectiveness was noted by all the attendees. Anaru remarked on the significance of this advisor: "She was very active. She was quite important too … while we were establishing the cluster. The Management Committee, we were, were really finding our way for a start – making mistakes" (pp. 5-6). HB pointed out, "She was our mentor" (p. 6.) whose support was indispensible to the Management Committee. In meetings, she would "sit and listen, and listen, and listen, and then she'd just pop a little gem in. She would look at what we were doing. And then, align it with research and best practice" (Chebz, p. 28). Hunta and HB found her feedback both practical and sensible, especially at the management's milestone writing time. In contrast, Junior, a new principal without the professional development experience of the founding members, rued this missed opportunity as an inequality. "One thing I would have enjoyed more would have been the PD opportunities to be involved with our advisor and the university lecturer [it would have] made my input better"

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[9] *PD was often used by the participants as the abbreviation for the term, professional development.*

(p. 29). The sessions facilitated by advisors and academics were seen as the base from which "our concept of gifted and talented definitely came from" (Chebz, p. 11). The other principals concurred; they all endorsed the notion that professional development, especially in the early days, provided a sound foundation for shaping how the cluster performed.

The creation of a cluster philosophy of giftedness

The data supplied a good deal of evidence to show that the conceptualisation of giftedness was woven into the evolution of the TDI project. Basically, the philosophy premised the way in which the educational programme was designed by the cluster principals. In all, there were more than five pages of transcript of dialogue on this broad topic, which amounted to over ten percent of the interview content. The main inference was that this understanding of gifted education ran alongside a parallel construction of giftedness belonging to, and befitting, the cluster. For Anaru, this was one of the notable outcomes because they had to think clearly about "what a gifted child was and how we could identify" (p. 14). A marked feature in the middle stages of the interview was the discovery that development of the cluster echoed the management team's growing confidence in the identification of giftedness. This strengthening of the theoretical perspective informed the robustness of programme. HB summed this up as: "We got our philosophy really, our information from the Advisor and University Lecturer and that's where we got our structure … our theory and our feet on the ground approach too" (p. 28).

From an academic perspective, the data showed on several occasions that a cluster definition for giftedness seemed to suggest the identification of only the brightest students. HB noted: "We always took that approach of gifted actually being a very small percentage … to get onto the register you had to get a Stanine 9" (p.11). Chebz agreed that the purpose of "the cluster was to create programmes, and if you were providing an academic focus, you wanted those top-notch kids there" (p. 18). This intellectual differentiation epitomised the selection of "very bright students who were good speakers performing at the cluster debate" (Hunta, p. 11). The Management Committee was "not providing for the masses" (Chebz, p. 12). The emphasis on individual achievement meant that for teaching purposes, the

student ability had to be pre-set at a specified range and resulted in the need for standardisation. The measurement tool of national assessment was therefore used, but only to correspond with higher level programme design. Otherwise, for a rural principal from a very isolated school driving in over an hour each way into a programme, "there was a risk that if a child was floundering, then you were really just wasting your time, their time, and the teacher's time (Hunta, p. 12). Thus, the high level focus was a defining characteristic so that the expectations of these students by their school communities were more likely to be met. "The concept developed and became quite rigorous over the last couple of years" (Babe, p. 14). This recognition of the need for accelerative practice denoted the shift in management attitude on how to better provide for exceptional students in accordance with gifted education principles.

The identification process

The evolution in understanding on giftedness was expressed in the data as an ever-changing need for the drawing up of a working template:

> In the beginning, we tried to take an academic look at it from an academic perspective. I think that was the easiest way, but we soon found out that wasn't going to work all the way through, and we changed our minds on a number of occasions throughout. (Anaru, p. 11)

To this end, early in the second year of the TDI contract, a subcommittee of principals worked together to compile their own common indicators of gifted attributes. Based on an identification tool from their advisor, they formulated a checklist of traits and behaviours of giftedness or potential. The "Talent Detector" (Anaru, p. 15) was modified as the cluster's own resource for analysing giftedness through a multi-faceted viewfinder. It was accompanied by the drive for data to support perceptions and triangulate evidence. "It made the teachers look at the conscientious kids who worked hard. It made them look a bit deeper" (Junior, p. 15). This shift in thinking included closer scrutiny of those presenting with behavioural issues: "The most distracted, and why are they distracted" (HB, p. 15). As time went on, teachers had to justify with proof why they believed a child was gifted. One principal would ask his teachers: "Why do you say that? What evidence have you got? Write down that evidence now" (Anaru, p.15). With practice, they grew "more astute at making sure" (Hunta, p. 12). Furthermore, this

growing rigour in identification was formalised in a joint approach with each school submitting their "Student ID template" (p. 12) for a Cluster Register held in the REINC office.

A multicategorical interpretation of gifted and talented education

 A stand out feature from the data was the equity between the classifications of 'gifted' or 'talented.' Both groups of students were catered for separately to ensure their needs were addressed. "The difference between gifted and talented was never an issue for us. It never caused us any angst or anxiety" (HB, p.19). Characteristically, this distinction happened in an inclusive manner for the creative, cultural, and performance strands: "We, over time, developed, really good ways of identifying the talented kids and we had a very broad interpretation" (HB, p. 11). A more holistic and multicategorical approach unfolded within the cluster. "If the workshop was a talented one like art or music, leadership, well then you put your best kids in there" (Chebz, p.18). The less academically-orientated programme was run as "In-School Talent workshops" (p. 18). Children demonstrating creativity, or inter-personal leadership skills, were catered for with more performance-type activities delivered by expert tutors sourced from the local community. Hunta attributds this to "The Co-ordinator's role, moving and talking in those professional circles to capture quality personnel" (p. 18).

The inclusive nature of giftedness was characterised by the 'net cast wide' approach to cater for a broad range of talents. "I think what the cluster has done takes it away from the heroes of the school just being the good rugby or netball players" (Chebz, p. 35). A case in point was "the chess kids because this brought out our Māori boys" (HB, p. 35). "He couldn't read or write, but by Jeez he could play chess" (Chebz, p. 35). The Māori boy concerned was identified by local chess masters as a gifted player, who won second place at a national chess tournament:

> He got up and spoke at the cluster finale for the community. His Dad was there. Dad had been a 15 year old drop-out and that was his boy - you know, he was sitting down the back, and he was just about in tears. (HB, p. 34)

A tikanga value system, with recognised cultural traditions, was acknowledged to better accommodate a Māori framework. The double-sided method of identification incorporating a Māori world view went towards making a prototype of giftedness particular to the region. This example was mentioned: "It was the only time we deviated from things being available to everybody because we deemed it would be okay for R. to run something at her school for that particular group of Immersion Te Reo speakers" (HB, p. 31). The principals demonstrated an openness to manage the cluster from a cultural paradigm reflective of the high number of Māori children in some of the schools. However, it should be noted that there was very little mention in the transcript of data relating to a specific Māori cultural perspective. Any text on this subject highlighted a holistic kaupapa and a multi-dimensional construct of regional giftedness.

The development of a child-centred approach to the programme

The programme took a child-centred approach in line with the philosophy of the Management Group. HB makes this affirmation: "Always one of the aims and rationale was the kids came first. Whenever we came to an impasse or something, we would always come back to, hey, 'What's best for the kids'?" (HB, Chebz, & Babe, p. 9) The focus group members all said that this was their catchcry for the cluster and underscored the importance to have children participating in the decision-making process. It was recalled that towards the end of the first round of funding, in late 2005, "the TDI Co-ordinator from the Ministry, came along to Management meetings to talk to us" (HB, p. 19) about establishing a proactive student voice. As a result of this piece of advice, the principals then held individual interviews with each child identified as gifted. The twin aims were to find out what exactly these students felt to be their needs, and how these could be addressed by the education programme. "Over time, we got into talking to the kids about what they wanted (HB) … And what did they say all the time? (Chebz) Cooking and Art" (several voices and much laughter, p. 19). This one-on-one conferencing revealed the children's common wish to have life skills education embedded within the programme. Chebz enforced the relevance of student opinion: "We would always be driven by that" (p. 18). This meant that if there was hesitancy in deciding the curriculum format, the accepted procedure was: "We gotta go back to the list" (HB, p. 19). The student evaluation was at the crux

of the Enhance TDI and propelled the way the principals formulated the brief for the programme. Babe commented: "That's when science came in because they wanted more hands-on and problem solving" (p. 20). HB labelled this learner-managed approach as "the thrust of the philosophy" (p. 19) because the student viewpoint was valued to the extent it became a stand-alone perspective in its own right.

Management Group mode for consensus and decision- making

The data showed that the decision-making was done in a democratic and consensual spirit as summed up by Hunta: "Ten schools, ten representatives, ten votes, eh? Everyone got a say … it was just ten people coming to a collective decision" (p. 21). Throughout the data, this theme of democratic power-sharing kept cropping up. Such visibility signalled its importance to the ethics of the cluster. HB made reference to the value of an equal say: "You know someone at the meeting might have said, "Personally, I don't agree with that, but it's a collective consensus" (p. 31). There was never any "professional jealousy" (HB, p. 31) between the schools because "no big egos were involved" (Chebz, p. 9). This resulted in a "clear direction" (Hunta, p. 31) and a mandate of power. The size of the school had no bearing on the authority around the table. In keeping with this point of view, REINC had one vote as HB emphasised: "The Project Manager[10] had an equal voice to any of us" (p. 24). Having the principals on board, who were at the top echelon of their schools' internal power structure was regarded "as a damn good sort of practice" (HB, p. 41). This advantage translated to efficiency. With the school leader at the table, there was immediate authorised control over the decisions made. Their presence was a timesaver in that "you didn't have to go cap in hand saying please can we do this … they could just say 'yep' have our hall" (Chebz, p. 27). The instantaneity made for a clear cut process for the REINC co-ordinator to follow without the need to continually consult with the management leaders. This leadership quotient also had a bearing on the practice of sharing of resources and co-operation. It took the shape of the larger schools helping out the smaller, rural schools by providing venues and resources. For example: "We'd run a workshop at HB's school because he'd have a spare

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[10] *The principals use the titles Co-ordinator, Project Manager, and Director in the text to refer to the researcher.*

room for debating" (Hunta, p. 27). These benefits were appreciated by the country principals: "The generosity of the bigger schools was important for the little schools" (Junior, p. 27). This cross-school collegiality was a noted strength and clearly marked the overall manner in which the cluster managed its practice.

5.5   Summary: Section One

The results from this first section highlighted the specialised ways in which the cluster was managed. Furthermore, the data inferred that the following eight factors were particularly important to the management leaders:

1. The pilot cluster between three schools provided the blueprint for working collaboratively;

2. The uniqueness of the region's rurality was a mitigating factor in coming together to work in a cluster;

3. The benefits of contestable funding and the advantage gained as a TDI project;

4. The vital partnership between the Management Committee and REINC;

5. The critical role of professional development;

6. The creation of concepts for giftedness and talent based on a multicategorical method for the cluster identification process;

7. The development of an evolving child-centred approach to giftedness; and

8. The democratic and consensual decision-making of the Management Group.

These shared understandings were based on the voices of the participants and their views on how the cluster was managed. The themes reflected the significance assigned by the principals to certain parts of the cluster model, and the relevance of their integral role as the management body. The next section will focus on the perceptions of effectiveness of the cluster.

SECTION TWO

The second research question heads this section:

5.6   How effective was this management model as a mechanism to provide for gifted and talented children in a rural region of New Zealand?

The coalition with REINC

The data clearly denoted the importance of the relationship between the school leaders and the external organisation of REINC. This commendation is made alluding to the quality of REINC's contractual work.

> At the commencement of the TDI contract, gifted and talented education became for the head of REINC, one of the passions of her job … Having REINC as the fund holder and subsequently contracting the Co-ordinator to do the organisation, ah, - was certainly one of our strengths. (HB, p. 10)

REINC was the institution through which all the facilitation processes were channelled to meet the requirements of the Ministry of Education. Hunta gave this explanation of the procedure:

> It was where the Co-ordinator's crew fits in … it meant that things would happen and it wasn't another job that our principals were tied down to doing. We would sort of come up with the plans and someone else would keep them running for us, so that was pretty, pretty important. (p. 10)

The fact that an outside organisation was part of the team was seen as an advantage because it took the pressure off schools and time-deficient principals. "The dedicated time to do it … a job that they did instead of it being something piled on top of somebody at a school" (Chebz, p. 10). It basically allowed each group to get on with what they did best: lead and manage; or co-ordinate and implement. Chebz summarised the characteristic efficiency: "We got to the meetings, we made decisions … things were done, they happened, people were paid for their time … (Hunta: … and yeah) and the kids got the programme" (p. 10).

Evaluation of the child-centred programmes

The evolution of a shared culture was critical to the effectiveness of the cluster as a TDI. This gifted and talented education culture was based on the values of trust and respect. Just as importantly, this ethos stressed the importance of placing the

gifted child at the nub of the provision. Throughout the length of the transcript it was clearly evident that the principals kept coming back to their cue of what was the best decision for the children. Right at the centre was the finding that separate, one-off programmes did not suit or work for the children. As HB recalled: "The main thing we listened to from the kids was please don't send us to something once because we don't like it" (p. 23). The conclusive result was that there were no "one-offs" (HB, p. 36). The text indicated that this principal was an advocate for the planning and of workshops on a continuum. In regards to determining the quality of the cluster's programmes, the student self-appraisal method was critical. It was a medium through which gifted and talented children could express their own thinking and personalise their learning. Student opinion was reinforced with principals' feedback and this coincided with a tutor self review process. An integral part of this evaluative system was for the Project Manager to have a presence for a short time at most of the programmes. This contact gave an overarching perception of what was happening, and an intuitive feel for how the children were responding to the teacher. The visible appearance to represent management was highlighted by Hunta when he noted that the co-ordinator almost without exception attended every programme. In the later years of the TDI, parents were approached for their insights through a questionnaire. HB acknowledged that this was a learning curve:

> We got a lot better at doing the assessment and review of the programmes as we went along and that was something we passed over to the Director to do and, with her efficiency, it always happened. She got all the feedback forms and made sure they were collated, and we knew whether it was a successful programme or not. (p. 23)

Hence, ongoing and constant evaluation from all represented groups was integral to the robustness of programme delivery.

The affective side of giftedness
Throughout the transcript, there were many references to nurturing the social and emotional development of students. The support mechanism for these sometimes vulnerable children took the form of a sense of community. The "wrap around effect" (Hunta, p. 17) engendered a feeling of belonging to a special cluster of

kindred learners. Hunta emphasised this socialisation aspect. "They grew and they became friends" (p. 17). Chebz remembered:

> That's when we started talking to the Advisor about the affective side of learning and how important it was for these kids to be together. And then we realised that when our first lot went off to Intermediate, they all went upwards and took off. (p. 17)

Professional development flagged the importance of looking more closely at what gifted and talented children needed. "In some ways, irrespective of what the programme was, it was their own company – like mindedness – that they enjoyed … they just enjoyed getting together with kids of the same ability" (HB, p. 23). Most significantly, it was the meeting point and congruence of like-ability with like-minds. "They weren't ridiculed by their peers back at school at all" (HB, p. 17), rather they were accepted and respected for their talents. These children had a unique place in the world as a result of the commitment and professional understanding of the Management Committee.

A student leadership model

Time and again, the participants pointed out that they considered the programme effectively bolstered student esteem as a prelude to stronger self confidence. An aspiration of management was to have children feeling comfortable with their own image of giftedness and talent. It was this aim that led directly to the setting up of a Cluster Student Council (Year Six students), whereby selected children represented their school on this body. The programme was "driven by the model BH had of leadership building and understanding what leadership is" (Chebz, p. 40). Skills of leadership were enhanced through co-operative learning in a team environment. Leadership in this context was valued as both an attribute and domain of giftedness, therefore becoming an integral strand to the programme in 2007 to 2008. Babe commented on the uniqueness of this differentiated provision: "As a new person coming in, I hadn't seen anything like that before" (p. 40). It was an experimental initiative using the expertise of three management members over its timeframe. In the latter years, growing future leaders became a core strand of interpersonal development for the TDI. Chebz worked with the students on identifying a real-life problem within their schools. During 2007, leadership took the form of a social action project culminating in a presentation to

the local District Council. The programme focused and reflected on what was happening in the region, 'in our place" (HB & Chebz, p. 43). The fostering of leadership qualities seemed to "take on a life of its own" (Babe & Chebz, p. 40) to such an extent that it ended up as "one of our major programmes that's been totally sustained and embedded in our school" (Babe, p. 40). The test of its success was the obvious enjoyment for the young leaders. "The kids love it and were always asking will I be on the Student Council next year?"(Chebz, p. 40) Such student eagerness ensured the sustainability of this strand so that it became a trademark of the cluster and all it stood for within the regional community.

Issues for the Management Committee

From the data, two negative issues for the cluster were identified:

1. *The gap in linking the cluster's knowledge to the classroom teacher*

The principals reported a small disconnection between the outer cluster practice and the in-school understanding of how to better address the learning and affective needs. There seemed to be a slight mismatch in the sharing of mutual cluster knowledge and the passing on to classroom teachers of gifted and talented students. HB pinpointed that the research showed that differentiated learning was "more than taking kids out" (p. 36) for withdrawal programmes. Chebz felt this gap in linking back to the schools proved problematic because some teachers believed their children were "missing out on their daily classroom programme, when in fact this was an enrichment and extension programme" (Chebz, p. 32). This attitude was far more prevalent and entrenched in the early days. In order to alter this mindset, management made it a priority to upskill new teachers, or re-educate the unconverted. "It was a matter of talking to staff in a way that affirmed and recognised the practices they did every day that were differentiated for those high achievers" (Chebz, p. 36). The advice from the cluster's mentor was echoed by Chebz: "Differentiation in the classroom is far more powerful than providing one-offs out of school" (p. 36). Concentrated professional development changed teachers' perceptions so that they could better see what these students required and also gave insight into "how the cluster programme strands linked back to the classroom" (Hunta, p. 36).

The mediating link between the cluster and the schools revealed a willingness to try new theories and different teaching approaches. This experimental focus resulted in "Literature Circles" (Chebz p. 36). The literacy extension was trialled by a cluster principal for students with very high reading ages. The precept for this programme was the aspiration to enhance comprehension skills and encourage a love of literature. The positive effects of this school-based professional development ended up with a domino effect where "we'd split, and then we were running three at three different schools at one stage" (HB, p. 28). The strand was broken down into smaller units of learning, circling out into the outer reaches of many classrooms. It was more like a cascading effect because teachers modified the model to suit their students. HB described the process as a consensual decision. "Mm, I kind of like that. And everyone started doing it" (HB, p. 36). Consequently, the end product was "good classroom teaching" (HB, p. 37). This example embodied the 'ripple out' effect of the cluster to recreate multiple hubs of a tried and true programme.

2. *An administration issue for the Management Committee*

The most discussed example of a problem confronting the Management Committee was the matter of financial reporting. The data in the middle section insinuated that the administration of finances had been a vexing issue. The conflict appeared to centre on the incongruity between the REINC financial systems and the Management Committee's expectations for reporting clarity. Noteworthy, all responses clearly indicated there was nothing sinister or fraudulent in the audit processes. Instead, it was the need for a readable format of presentation to the Management Group on a regular basis. The leading voice in this section was HB and he summed up the problem as: "The only issue we had with the REINC organisation was over the tracking of some of the finances" (p. 24). The crux of this debate seemed to be the demarcation of responsibilities for the contract management and the contract administration. The difference in roles between the Management Committee and REINC were defined by Hunta in this way: "We were the fund managers and they were the fund holders" (p. 10). The responses suggested this was directly due to an incompatibility of the working systems between management and administration. From the leadership perspective, Chebz expressed this tension in operating practices: "We felt that we

didn't have any control" (p. 25). HB recounted: "They had a problem and really that was never resolved and it did cause some angst between the Management Committee and REINC" (p. 24). Chebz believed the matter was "a systemic thing" (p. 24). There were many indications of a marked disagreement on what constituted an informative template for the cluster's funds. Chebz summarised: "We really just needed to know where the money was going" (p. 25), or in other words, "the state of our bank balance, basically" (HB, p. 25). Chebz expressed the overall feeling of exasperation: "It was a point of frustration" (p. 25) because "there wasn't like a clear paper trail really" (Hunta, p. 25).

The data showed that the interviewees unanimously believed there was a communication breakdown in having their expectations met. Chebz informed that the professional relationship with REINC suffered to such an extent, "the members of the Management Committee actually had a discussion about having the fund sitting within one of our schools … (HB: Mm)" (p. 26). In an endeavour to find a solution, HB, was shoulder-tapped for representation at the governance level. In his words: "That's when I went on the Board and I took the issue up with the Board" (p. 26). Chebz maintained this was an important move because HB "could be the voice of what should be happening" (p. 25). The management's child-centred focus of the project was the driving concern to ensure the money was wisely spent so that the students were always the beneficiaries. "I mean every dollar counted towards providing for the children" (Chebz, p. 25). Importantly, all the participants held the opinion that this issue did not cause any friction between the members of management. Hunta explained: 'It was almost like there were three levels. There was obviously REINC, and then the Director[11] who was pretty much part of our team all the way along. So the issue was outside of the room really" (p. 24) and "outside of the meetings" (HB, p. 24). All present agreed the problem was external to the leadership and management unit:

> The trouble was that it went on for a long period of time – much longer than it needed to, which was not our Management Committee's problem … It wasn't ever resolved 100% (No) but the money – ended up where it should have been. (HB, p. 26)

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[11] *The REINC co-ordinator was now the director at this later time of the TDI era.*

Yet for all the division over the finances, the viability of the professional relationship meant the two groups continued to work together constructively for the duration of the contract and beyond. The partnership survived and met the contractual requirements. HB made this telling statement: "It didn't ever deviate us from what we were trying to do" (p. 24). The perceived value of the cluster overall was never truly compromised because "in the end, some very good practices developed out of it" (Hunta, p. 41). HB concluded the discussion on a positive note: "In terms of Government monies that went into the contract, to me, it was money very well spent. Having REINC as the fund holder and subsequently contracting the Director to do the organisation, ah, - was certainly one of our strengths" (HB, p. 40).

Thus, there was a distinct sensitivity surrounding this problem exacerbated by the fact the researcher worked with both parties as the director. The risk of researcher bias is therefore dramatically increased. Hence, the use of the literary technique by the thesis writer to relay as much as possible the exact words of the participants. This strategy was employed to convey a sense of neutrality to the dispute.

A perspective on the effectiveness of the cluster model

Collaboration was an interlocking theme to the entirety of the cluster and the fulcrum to the provision. HB expressed his view on co-operation: "You struck on it, the benefits" (p. 42). Appreciation for the value of working together filtered through to the children and strengthened the management approach. "A whole lot of people benefitted from it. We've benefitted from it at management level just through the collegiality and camaraderie that's built up. The children have definitely benefitted from it; a great experience" (Chebz, p. 43). Hunta reinforced this attitudinal position in his reference to the cluster's mentor: "I think the Advisor saw what we were doing and without blowing our trumpet too much, saw we were doing it well and it was working. We should be rightly proud of it because it kept working" (p. 29). Two rounds as a TDI project offered the latitude to try out new things, then tweak and refine as the need arose. "We got better at it" (Anaru, p.11). Hunta saw longevity of funding as a shapeshifter: "The beauty of it was that we could change as we went. We could learn from our mistakes" (p.

40). Thus, having the advantage of six years to enhance their model enabled a "growth in confidence over time in the cluster" (HB, p. 15). All present at the focus group were united in their views that their model was not only impactful, but adaptable, and long lasting. "We found that sense of purpose … never deviated from the kids at the centre and we were happy to try new things – we evolved" (HB, p. 29). The cluster was considered an effective mechanism for the delivery of the provision.

Sustainability and replication of the cluster model

The principals viewed sustainability as a key performance indicator for the success of the programme. The evidence that the cluster kept going after the TDI funding ended was testament to the nature of a strong, healthy, and vibrant model. Hunta summed up the impact of the cluster:

> What we've done over the past few years has become, kind of entrenched in the schools. We're all on the same page. The practices are out there. It's a perfect model. I'm damn sure; you go ask anyone (General agreement). From a small school's perspective, we'll cling to the cluster because we can't do it on our own. Bottom line for us. (pp. 38–39)

Babe, as a late starter to the group, highlighted growing self assurance as something that mattered to her in her motivation to become an effective principal:

> At the beginning I was a lot less confident about what we were doing. And that's why the cluster was so important. The networking; the going to other schools; the sharing. That was great, and so now, we're at the stage where we're running things ourselves, within our own school. And that's all from this cluster. (Babe, p. 38)

The cluster philosophy became embedded as familiar practice within Babe's school structure. Chebz had no qualms about continuing to co-operate with other schools in the future: "We have a high trust in clustering so we would never hesitate to go and cluster in some way again … we liked this model" (p.38). HB, Hunta, and Chebz (p. 38) made the point that the model had proven ability to be copied in other settings. "The Director has taken the model to two other clusters" (HB, p. 39) and "she's spoken to people out of town" (Hunta, p. 39) so "we must be doing something right" (Chebz, p.39). This demonstrated the replication trait of the model. It had the adaptability to be transposed across to other groups of

schools, moving outwards beyond the district. Lastly, HB pushed the circle of reference out further when he defined his measure of effectiveness as the stamp of individuality in new circumstances:

> I suppose you could say it's sustainable in a sense that what everyone's taken away from it, they can do in their own environment, whether they're in the cluster or not. This says it's successful so it will have ongoing impact. (p. 39)

Hunta also acknowledged the appeal of the formula: "Other schools wanting 'in' all the time, eh? You know it's actually held in quite high esteem out there in the public forum" (p. 43). Sustainability and the reproductive quality of the cluster proved that the model was both enduring and transferable.

5.7 Summary: Section Two

The results verified that the following five important factors underpinned the management leaders' key perceptions of effectiveness:

1. The coalition with REINC for the co-ordination and facilitation;
2. The development of a child -based perspective resulting in a student voice for evaluation;
3. The partnership with REINC was mostly considered an asset and a strength;
4. The ability to evolve as a team and become more confident over time; and
5. The sustainability of the model and duplication in other settings.

There were, however, two negative issues for the Management Committee to deal with through their democratic and consensual approach. The first anomaly was the difficulty in linking theory to classroom practice, which was only considered to be a minor disadvantage. The second matter proved to be testing. The disruptive conflict had long-reaching repercussions and clouded the in-cluster working relationships. In retrospection, the principals appeared philosophical about the problem although the incongruent financial reporting was a contentious debate for a considerable time. To summarise, the emergence of these key themes reflected the opinions of the participants and their perspective on the effectiveness of their cluster. The next section will look at the principals' thinking around the group ethos as a cluster.

The third question strand for the data to answer:

5.8 What was important to the management leaders? How did they view the ethos of their cluster? To what extent was this thinking, this way of being, at the centre of holding the cluster together?

The management community

Teamwork was singled out as a highly influential cluster component. Babe emphasised the importance of the joint effort from "networking, the going to other schools, the sharing (p. 38). These ingredients of co-operation were the bedrock to the effectiveness. Collaboration involved the integral "dunk, dunk, dunk principles" (HB, p. 43) of the commitment and the passion fortifying the cluster. These qualities focused on the kaupapa that opinions were valued as having equal importance. The meeting forum was a safe environment where "everyone was listened to and didn't turn around and sulk or anything like that, and you could sense as a new person, that there was mutual respect for everyone" (Junior, p. 22). This collegiality was brought to the fore by the newcomers to the cluster, Babe and Junior. They gained much from "listening to the established members" (Junior, p. 29). Their fresh way of seeing from an outsider's perspective seemed to heighten aspects of effectiveness. These two principals found particularly reassuring the warmth emanating from this alliance. "It was a welcoming place" (Junior, p. 22), where "there were some really robust debates, but this was how the decision-making was made" (Babe, p. 22). From the transcript, it is obvious that those last to join were not made to feel inadequate or inferior (p. 42). "It was just accepted where we were in our leadership journeys" (Junior, p. 42). Both new principals believed they were extremely well supported by the "old boys" (Junior, p. 42) of the cluster. Babe pinpointed this as evidence of community:

> You always knew that if you couldn't do it, you'd just email someone and they'd help you (Junior: Yeah) to get you back on track or to give you some advice or have a meeting with you just to get you back on the path. (p. 42)

The communication and professional support engendered a feeling of affiliation to the project and the cohort of workmates.

Communication and connection

The text showed evidence of a funnelled focus for the 2007 to 2008 years of the project. This narrowed timeframe illuminated the appraisal of both the performance of their REINC colleague and the quality of the implementation. HB made this comment: "When the REINC Manager wanted to step back, the Co-ordinator took over her position on the committee and that part of our relationship with REINC suited us fine – was fantastic" (p. 24). Once the decisions were finalised by the Management Committee, "You'd give it to the Co-ordinator and she'd get the list of the kids and then she'd make it happen" (HB, p. 26). Hunta endorsed this facilitation role: "At the end of a meeting, it was only a matter of the Co-ordinator having to sort out the finer points like times" (p. 26). Chebz affirmed that the Co-ordinator was busy as the energiser and the action-maker, "just organising (laughter) and getting names, oh yeah, she was lovely and efficient" (p. 26). The inter-cluster communication was an asset for the smooth implementation of the provision. Babe offered this plaudit: "The Co-ordinator was just great at keeping us all linked" (Babe, p. 30). The networks connecting the schools to the cluster enhanced the sense of belonging. The constellation of communiqué tied everyone together and personalised the cluster as a model of camaraderie. There was the reassurance that "there's always someone there" (Babe, p. 39) in a type of "buddy system" (HB, p. 27) wrapped within a supportive community.

Cluster collegiality

The essence gleaned from the data was that at the core of the cluster stood the creed of a collegial way of working and being. This tenet of community was clearly important to the management leaders. Collegiality was at the heart of the group identity holding them all together. One particular passage had true resonance. Chebz defined the working ethics as: "This is where the sharing, the trust and the respect come in. You gave as much as you could give. And it was accepted that this was what was on offer. Nobody asked for more" (p. 42). HB gave this blunt summation of the cluster initiative: "We delivered a hell of a lot of programmes to a hell of a lot of kids and we built teacher knowledge. Can't ask more than that really" (HB, p. 42). Although the narrative styles differed, the message was the same. Every management member was expected to contribute as much as possible to strengthen the programme and support each other. In HB's

words, there was clearly "a generosity of spirit" (p. 43) between the cluster colleagues befitting the sense of community that identified them as a group. Inversely, the collegial feeling the cluster engendered in rural New Zealand was contrasted in this declaration: "Much more so than in a bigger centre, I can tell you. Doesn't happen the same" (HB, p. 37). Collaboration and collegiality were two parts of the cluster whole.

Collaboration within a 'high trust model'

In addition, the culture of collaboration between the management-facilitation dynamic was integral to the style and class of the project. The partnership was built on a "high trust model based on a lot of give and take" (HB, p. 42) integrating professional respect for institutional approaches and different ways of working. This relationship stood at the hub of the cluster right alongside the principals. Team play was seen as a mutual benefit, especially with "that administration and having that "go-to" person, the organiser" (HB, p. 10) to bring the dual perspectives together. The four other participants present at the Focus Group all agreed. This unanimous viewpoint was evidenced in this evaluation made by Hunta near the end of the interview:

> Having a dedicated facilitator or organiser like the Co-ordinator (Chebz: Yes, yes) … who could really put a lot of time and effort into keeping the (Chebz: structure) thing going. Like the mundane part of it. Like, harassing everybody and chasing people along and just doing the organising and shooting out to places. Just being that vital link person. (Babe: Bringing us back to the kaupapa as well). We say it's a little job. But actually in essence, it's the biggest job (Agreement). That face of the Cluster, if you like. (Hunta, p. 41)

HB affirmed this opinion with this statement: "The resource we spent on using her services was an enormous part. We never felt like we got our bang for our bucks with that Project Director from that ICT cluster. With the Director, we got ten times (Mm)" (p. 41). Thus, as the researcher it would be fair to surmise that the partners were only as good as each other. It conclusively appeared the facilitation position acted as the axle to maintain a balance within the coalition and to keep the cluster moving forward together.

At the centre: camaraderie

The theme of commitment to the cause, and to each other, proved significant to HB. "Within the group, the collegial support that we provided for each other, in and outside of that time was pretty good for us, wasn't it?" (p. 34). It was the spirit of collegiality and the bond of camaraderie. "You know, I think you just need to see, we hadn't seen it for a while and it's still there" (HB, p. 34). There was an atmosphere of friendliness and conviviality when they met together. Hunta agreed with this comment. "I have to drive an hour each way to get here, and as HB said, you do actually look forward to seeing people. I mean it's a pleasant working environment" (p. 35). The personal allegiance rippled out of the region for HB. "When I got to my powhiri at my new school, two of the Management Committee – who I didn't know would be there - turned up, so you know, that was something" (p. 34). This was testament to the strength and loyalty to not only the cluster alliance, but to each other. In the closing stages of the transcript, the dialogue crackled along with an energy and sparkle. "The fun we had. We had a lot of laughs, which kept it rocking along" (HB, p. 34). A remarkable feature for the cluster was the liveliness and revelry in the team meetings, because the leaders all enjoyed coming together as a group. "I have to say; we just had a ball" (HB, p. 35). This strong comradeship was the glue binding them at the centre. The integral ingredients were collaboration, collegiality, and camaraderie. The quintessential quality right at the axis holding the cluster tight was the feeling of togetherness. The hallmark of their ethos was simple: Together, they were better.

5.9   Summary: Section Three

The complication of implicit writer bias was a highly limiting variable for the depiction of the results from the data. Hence, the style of descriptive presentation was deliberately chosen to allow the participants the much needed freedom to express themselves openly, in their own words. As previously stated, the aim of the chapter was to tell the story from their personal perceptions and from their point of view. This decision meant that little in-depth analysis occurred to summarise the data through a filtered researcher perspective. Yet for all the simple narration, it is safe to conclude that the results confirmed that the development of a cluster ethos was of considerable importance to the principals. From their perceptions, the emergent and emphasised themes were:

1. The strength of management as a community;
2. The significance of the role of communication and connection;
3. The growth of collegiality; and
4. The high trust model of collaboration.

Thus, camaraderie was identified as a valued quality for working in the cluster team and the 'essence' for the cohesive sense of togetherness.

CHAPTER SIX

DISCUSSION

6.1   Introduction

The world of the cluster is a complex and busy place. There is always a good deal happening at once. This qualitative case study aims to tell a story from the viewpoint of the participants by providing rich and descriptive detail (Roberts, 2004). It is a portrayal of a constantly evolving situation connecting the management to co-ordination, and then channelling outwards to the implementation of the programme. There is a continuous interflow of information going around the cluster at any given time. The intermediary point is the co-ordination role, controlling the communication to link the schools to the TDI contract. Yet it is critical to acknowledge that right at the heart of the cluster dynamics are the people themselves. This is the human face of the cluster. The provision is made up of three sets of participants, namely the gifted and talented children, the principals, and the REINC staff. In essence, the cluster is primarily about interrelationships and it is the strength of this multi-group interaction which testifies to its educational effectiveness.

6.2   The research question strands

This Discussion chapter is organised into sections according to the three research question strands. To reiterate, these investigation categories are as follows:

1. In what ways were a group of schools involved in gifted and talented education managed as a cluster?

2. How effective was this management model as a mechanism to provide for gifted and talented children in a rural region of New Zealand?

3. What was important to the management leaders? How did they view the ethos of their cluster? To what extent was this thinking, this way of being, at the centre holding the cluster together?

6.3 The themes for discussion

The major underlying themes developed out of the data were focused on specific areas. These topics will be explored according to where they fit under the research questions:

1. The ways the cluster was managed

The thematic blocks arising from the results chapter were:

- The relevance of a pilot cluster model;
- The uniqueness of the region's rurality;
- The importance of the partnership with REINC;
- The tool of professional development;
- The development of a child-centred approach to giftedness; and
- The Management Group model.

2. The effectiveness of the management model in the cluster

The results showed that the following factors were important to the management's perceived effectiveness of the cluster:

- The importance of the facilitation and the role of the co-ordinator;
- The significance of leadership;
- Professional development as a key determinant to effectiveness;
- The development of the team for effective practice;
- Negative issues to be resolved by management; and
- Sustainability of the model and replication in other settings.

3. The ethos of the cluster

The final section from the results revealed the essence of what the management leaders regarded as vital to the cluster. The core principles highlighted were:

- A child-centred philosophy;
- Passion and commitment;
- The team approach; and
- Collegiality and camaraderie.

To provide a sense of structure and coherency to the thesis, the central themes linking to the results from the data will be listed under the research questions

headings. These distinct strands will then presented as discussion topics for the remainder of this chapter.

6.4　The key findings on the ways of management for the cluster

There were several major findings correlating to the management of the cluster:

1.　*The relevance of a pilot cluster*

One important finding to underline the design of the cluster blueprint was the fact that three schools joined together in a pilot project. This small-scale method of enrichment for talented students took place in the early 2000's. The rationale behind this low-key approach was to pool human resources to capitalise on the teacher expertise in these schools. The informal mix featured two urban schools working with a remote rural school in a mini-cluster of talent extension. This original prototype showed all the hallmarks of TDI collaboration in that the three principals created a strategy for gifted education and a bond of co-operation. As a consequence of the urban-rural interrelationship, this small initiative provided a practicable template for a bigger scheme involving more schools. Although a little ad hoc in nature, there was a predetermined local awareness for a larger regional project. It was a precursor for a grander vision and a greater synergy. Thus, the pilot demonstrated that there was a predisposition for district schools to the concept of clustering to counteract rurality.

In an Australian non-gifted education context, the Boys' Educational Lighthouse Schools Project (2006) endorsed the "great advantage in working together to share ideas and expertise" (Hartnell-Young & Neale, 2006, p. 10). This research showed the educators recognised the "value of community building and demonstrated the importance of involving all stakeholders" (p. 10). Furthermore, again in Australia but with a focus on giftedness, Braggett and Moltzen held this view:

> Cluster groups are seen as a specialised and economical way of providing for gifted students at primary and secondary level, allowing a number of schools which are in close proximity to plan and implement joint educational programs for teachers or students. (2000, p. 786)

The New Zealand example was similar in specialisation and the link to economies of scale. The principals were all unanimous in their opinion that funding was crucial to the extent of the provision because "money buys time and resources" (HB, p. 27). Ribchester and Edwards, examining the role of clustering in England and Wales, agreed that additional income was imperative: "Cluster effectiveness would be diminished if financial support was removed and activities would be more limited in many instances" (1998, pp. 6-7). Sufficient funding was considered an integral ingredient for schools in geographical proximity to merge successfully as a union.

Correspondingly, in another part of the world, a case study from Zimbabwe of a cluster undergoing decentralised school governance found "a history of success in innovation by a system is likely to have a similar impact on new attempts at implementing change" (Chikoko, 2007, p. 37). Thus, one effective approach heralded the likelihood of another more advanced venture. Chikoko identified that "innovations must be well conceived and articulated, since they bear far-reaching implications" (p. 37). The finding for the regional New Zealand study was similar. The principals all concurred that the fact these schools had worked together in a smaller capacity, prior to a formal cluster approach, was central to the TDI cluster's success.

2. *The rural effect on the uniqueness of the region*

The isolation of this region was a strong contributing factor to shape the way of working and managing for the group of schools. This was a background finding for this study. Rurally gifted children are often considered to be the poor relations in the New Zealand education system (Ayr, 1998/99). Keen discovered that: "Virtually all rural schools expressed concern at the unequal costs of resource access which they incurred" (2004, p. 277). The cluster was the mechanism of choice to negate the impact of remoteness so that collaboration was an enabler to better support these children in the schools. The catchphrase from the data, "We knew that together we could do better," was a driving force to improve the standard of education for children with high capabilities. The principals believed the physical displacement from opportunities to learn with intellectual peers was a disadvantage. Riley acknowledged the barriers exacerbating the sense of disparity

for gifted country children. "Issues rural school are plagued with, include isolation both geographically and for individual gifted students, a lack of community resources and the need for professional development" (2003, p. 21). The same sort of situation was evident for small rural schools in the United Kingdom: "Geographical location and sparse population can make networking and the delivery of effective provision problematic" (Gifted & Talented National Rural Network, 2008, p. 2). One management leader confirmed the thinking of the group and noted that "you see the power of clustering rather than working by yourself" (Chebz, p. 8). Relevantly, the Education Review Office signalled that there was a visible gap in the quality of programmes and rural schools were particularly placed in a debit-based position: "Urban schools were more likely than rural schools to have responsive and appropriate provision and programmes for gifted and talented students" (2008, p. 47). Thus, gifted students in this area of NZ were disadvantaged by their rurality, especially in terms of access to programmes, and this inequity became an impetus for the cluster development. Somewhat inversely, a negative variable informed a distinctive strategy, which then became a landmark institution for a regional gifted and talented world.

3. The importance of the REINC partnership

From the data, a conspicuous finding was the importance of the partnership between an external agency and a group of schools. A second conclusive component for this study was the fact that no other research was unturned to show resemblance to this two-way interactive model. The cluster composition of separate parties was not replicated anywhere else. No evidence was reported anywhere in the literature, thus suggesting that this bipartisan approach could perhaps be classed as unique. Furthermore, the principals considered that a most appealing attribute of REINC was its professional reputation within the local education community. The Management Group recognised REINC's wherewithal to put plans into motion and its capability to efficiently organise large groups of schools. The principals emphasised that a critical factor determining their management style was the assignment of an external administrator with knowledge in gifted and talented education. In their views, the co-ordination was a lynchpin to the effectiveness of the cluster provision. This contract partnership meant that no school or principal was burdened with the administration. REINC

dedicated the time to proficiently carry out the direction and decisions of management. The independence and autonomy of an outside organisation was clearly valued. There was the added advantage of a fresh perspective to independently critique the programme and to provide a sense of balance to the curriculum weighting of the overall provision.

4. *The tool of professional development*

Integral to the management approach of the cluster was the all-important strand of professional education. HB raised the theme of capacity building in this statement: "We saw the funding as a professional development opportunity for our staff and we were aware that because we had already run successful programmes, then the project could grow" (p. 5). Riley et al. pinpointed that "schools reported the need for ongoing, school-based, high quality professional development for all teachers" (2004, p. 278). The paramount importance of teacher education in giftedness was highlighted by the Education Review Office. "ERO recommends that the Ministry of Education consider how best to provide targeted, high quality professional development to rural schools on providing for gifted and talented students" (2008, p. 2). In terms of the rurally-based cluster, Chebz noted that: "We knew we had the teachers that were able to work with these kids and really push them" (p. 5). Therefore, a major driver for the contract resulted in direct funding for professional development. The management goal was to generate a stronger platform of knowledge for teachers to better cater for gifted children. In an inverse sense, where teacher training was poorly done or only carried out only superficially, ERO stated: "Teachers' professional judgement was often hindered by a lack of professional development to further understanding of giftedness and talent" (2008, p. 22). Hence, there was an obvious synchronicity between the Management Group, the ERO finding, and the research. All acknowledged that a key resource in gifted education was the expertise of the classroom teacher.

5. *The development of a child-centred philosophy*

Foremost for the cluster was the high relevance attributed to the child-orientated approach to engineering a differentiated programme. This principle encapsulated the leaders' ever-present consideration for addressing the needs of the gifted learner. The management catchcry, "What's best for the kids?" sat at the pulse of

their policy. The student-based programme was at the hub of how the cluster worked, and by extension, the way in which the provision was directed by the stakeholder group. The philosophy was always the same. All participants were committed to a clear child-centred focus. This overarching concern ensured gifted children would not become, in the words of bell hooks, "an absent presence without voice" (1990, p. 126). As a cluster derived concept, this kaupapa made a sound fit with the Government's policy (2006) at that time: "Personalised learning is about putting the student at the centre of education" (Maharey, 2006, p. 3). The ideal of placing the learner centre stage aligned with the Ministry of Education's modern maxim: "The Child – the Heart of the Matter" (ERO, 2008, p. 1). Yet, what is most significant for this study is that the principals came to this common understanding through a process of learning through doing. The incremental aspect of this way of thinking reflected the evolution of a distinctive cluster perspective.

6. *The Management Group model*

Critically, there was very little literature relating to the effectiveness of a cluster as a means of provision. Whilst the scarcity of evidence on the bipartisan method indicated its uniqueness, the same argument can be applied in New Zealand to the mechanism of a management model. The literature search proved quite futile for sourcing validating pieces of information. There were only snippets of research findings or comments attached to other content passages. For instance, one of the ten case study schools in the research of Riley et al. mentioned that "the school cluster network is effective because they have a committed group of people working together" (2004, p. 242). In this context, Riley et al. (2004) presented the finding that forty-three percent of schools reported having a committee for gifted and talented education. A more recent investigation on the patterns of leadership, confirmed that the New Zealand principals valued opportunities for professional engagement. They enjoyed "being able to meet and share ideas with other leaders working outside their own school was invaluable … to discuss issues with 'like minds' and get support from trusted colleagues" (Apted, Macnee, Court, & Riley, 2007, p. 7). Finally, another conspicuous feature concerning management groups was that the literature was dated and, for the most part, set in the pre-TDI era.

In the international context, there was little valid or comprehensive evidence on management of gifted provision. British researchers, Ribchester and Edwards, termed a cluster as "a single governing body for the whole group, although each school still maintains its separate identity" (1998, p. 3). This definition matched the intention and design of the TDI consortium. Ribchester and Edwards warned that although clustering can relieve some of the problems of isolation, it required careful organisation and a high level of commitment. School clusters, as an experiment for governance devolution in Zimbabwe, reported that their co-ordinating committee viewed collaboration as an applicable way to "share human, material, and financial resources in order to improve the quality and relevance of education in their institutions" (Chikoko, 2007, p. 24). In Australia, the aforementioned cluster project for the education of non-gifted boys (BELS) did bring to light the term of "community of practice" (Hartnell-Young & Neal, 2006, p. 2). This study identified three indicators of effective practice, which correlated with the cluster's experience: social engagement; imagination to build a positive vision; and alignment to "having an effect on the world through action" (p. 2). Finally, in the New Zealand context, the only other piece on this collegial way of working was the important recommendation by Riley and Moltzen (2010) that: "An advisory group or committee, representative of stakeholders, should be developed to ensure viability, effectiveness, and sustainability" (p. 147). This suggested body was highly reflective of the cluster model; indeed to such an extent, it could have been a replicated image.

6.5   The key findings on the effectiveness of the management model

The following points marked the key findings for the cluster's effectiveness:

1. *The importance of facilitation and the role of the co-ordinator*

The examination of the focus group perceptions sharply revealed that all principals held the co-ordination role to be a pivotal position in the cluster. This is a strong finding for my study. In an analytical sense, the principals believed that the facilitator was particularly useful for keeping the programme on track to fulfil the aims and outputs of the TDI contract. Commensurately, the Riley et al. research (2004) showed that each of the ten case study schools had a designated co-ordinator, hence demonstrating the importance placed on this job. This was

one of the main reasons that the Cluster-REINC relationship worked. The fact that the co-ordinator was assigned through REINC, rather than based at a school, resulted in impartiality for the professional role. The responses from teachers questioned by Riley et al. indicated that, conversely, "without the co-ordinator perhaps the initiatives would not have developed, implemented, and maintained" (2004, p. 271). In another instance, "teachers noted that the gifted programme is very reliant on the enthusiasm, drive, and expertise of the programme co-ordinator" (p. 260). This connector role anchored the entire provision and was a cornerstone for gifted education in the cluster schools.

The qualities of co-ordination

In the opinions of the principals, the cluster co-ordination both underpinned and overarched the entire provision, from start to finish. The role involved the vital ongoing evaluation and reporting to management or the Ministry. "So part of the effectiveness was keeping the communication going. That was everything. And the Co-ordinator was just great at it – at keeping us all linked up" (Babe, p. 30). As endorsement, the Education Review Office specifically highlighted the importance of this organisational role: "ERO recommends that school leaders designate a person or team to lead the school's provision for gifted and talented students and give them support" (2008, p. 54). It was critical to adapt co-ordination skills to implement the programme and to keep all leadership personnel well-informed of progress. This point was highlighted by Moon and Rosselli: "Programme developers need skill in change facilitation, planning, and programme design strategies … strong planning and design skills lead to coherent, theoretically sound programmes" (2000, pp. 506-507). In contrast, the Education Review Office (2008) found that just over half the schools had no co-ordination person, and therefore, did not have a systematic or shared approach. Hunta emphasised the advantage derived from the co-ordinator having first-hand involvement in all aspects of the educational programme:

> Yeah, we'd have the Co-ordinator, almost without exception, she actually was at every single programme (HB: She'd drop in, she would) and was able to get a bit of a feel for it … so that was really quite a good thing. (Hunta, p. 24)

Furthermore, Moon and Rosselli enlarged the idea of creating positive change to assist gifted students by stressing the magnitude of the advocacy role: "If a school district has a co-ordinator or director of gifted education, that person is in an ideal position to be the champion for the development of new gifted program components" (2000, p. 507). In this way, the co-ordinator became the crusader for the cause, and a change merchant to bring greater good for exceptionally talented children.

The style of leadership within the co-ordination

In the context of the cluster, however, the co-ordinator was seen more as the action maker; the person who operationalised the management decisions. HB explained:

> We had the Co-ordinator sitting in our group … Then we'd take on the role of going and sorting what was the programme itself, setting the objectives, what was going to happen, when and where, and then you'd give it to the Co-ordinator and she'd get the list of the kids and she'd make it happen (p. 27).

The principals prized this ability to activate and implement their leadership thinking. Chebz appreciated the energy needed for the co-ordination: "Just organising … (laughter), and getting names …Oh yeah, she was lovely and efficient" (p. 27). Yet, the point most heavily emphasised by the principal with the highest input to the focus group discussion was that: "The Co-ordinator followed our lead" (HB, p. 27). This implication can be paralleled to a 'leader-rich culture' (Mitchell & Sackney, 2000) in which people believe they have a contribution to make to an organisation. Placing value on leadership encourages colleagues to exercise their initiative so that they can, when necessary, even have their own followers. Furthermore, Apted, Macnee, Court, and Riley found that when principals in their study saw their "leadership style as being collaborative" (2007, p. 2), they tried to ensure that programme leadership was delegated in order to empower other members of staff. Correspondingly, where there was a team approach to co-ordination, programmes had more chance of developing and enduring (Moltzen, Riley, & McAlpine, 2000). In essence, the principals and the co-ordinator of the TDI Cluster worked together to augment their strengths of leadership or facilitation. Frost and Durrant (2002) viewed this mutual approach

as essential to the building of trust and social capital, because an organisation had to not only nourish its members, but also produce results.

Crucially, a well-informed enthusiast of gifted education can be a driving force in bringing about strong outcomes for students involved in a programme. "Schools which had a leader to push the drive for gifted and talented education, supported by a group of advocates, were also more likely to have planned policies and procedures" (Riley et al., 2004, p. 271). As testimony to the recognition of the importance of such a person, Riley and Moltzen (2010) noted in their evaluation of selected TDI programmes that an enabler was "having a passionate and committed programme director with knowledge and skills in gifted and talented education" (p. 143). For the Cluster TDI, these competencies filtered further into the areas of "documenting and planning the programme in writing; ongoing evaluation and reflective practice; physical, human, and financial resources; using a team approach; open communication with stakeholders" (Riley & Moltzen, 2010, p. 143). HB recapitulated how the cluster team approached evaluation and improved effectiveness with this statement:

> We got a lot better at doing the assessment and the review of the programmes as we went along and that was something we passed over to the Co-ordinator to do and, with her efficiency, it always happened. She got all the feedback forms and made sure they were collated and we knew whether it was a successful programme or not. (HB, p. 33)

This affirmation from a cluster principal reaffirmed that the REINC co-ordination role embodied Riley and Moltzen's recommendation for their research: "Co-ordinators need to have background and experience in gifted and talented education, as well as ongoing professional development and support related to their practice" (p. 2010, p.147). Discipline-specific knowledge enhanced not only the evaluative aspects, but the whole operation. A school co-ordinator, from the earlier study of New Zealand provision by Riley et al. concurred: "Get some theory under your belt. Do some reading and find out what you need to know about because you don't know what you don't know" (2004, p. 266). Horsley's taxonomy of findings on the first round of the TDI projects validated the critical importance of a skilled and educated project management. This priority is itemised as "Principle #10: Ensure project staff are suitably qualified and continue

to receive appropriate on-going professional development" (2006, p. 74). Thus, the researcher as co-ordinator embodied this recommendation because the opportunity to attend the advisor's professional development sparked a real interest in gifted education. This led to a growing passion and the motivation to learn more. Approval from the Management Group and REINC resulted in a small amount of subsidised funding to help undertake postgraduate studies in this field. Horsley validated the rewards of the academic learning journey: "By having TDI project staff who held or gained qualifications in gifted education was viewed as advantageous and a means to improving the quality of content delivery" (p. 74). It seems reasonable therefore, to conclude that a co-ordinator well-educated in the professional field was seen as an asset. Such a finding has considerable bearing and implications for other committees established to deliver a differentiated programme.

2. *The significance of leadership*

Clearly, the most significant factor to underline the management model was that of the leadership quotient. The fact that all the members were school leaders, either in the position of principals or deputy principals, was in itself telling. The Ministry of Education (2000) believed in the applicability of a programme committee including a member of senior management. The composition of the upper echelon of leadership was indicative of the high level of the importance the schools attached to their gifted and talented collaboration. Relevantly, no members of the management team around the table made any differentiation between positions; they were considered the same with each having an equal voice. Recognising the benefits of having the principal involved "meant that decisions could be made and programmes actioned more quickly" (Riley et al., 2004, p. 253). The focus group data throws up the same sort of thinking with the cluster principals. Hunta made this assertion: "The cluster was primarily driven by the principals or DPs at the top, which was good. They were like sold on the idea. So it was filtering down in our schools and thought of as being damn good practice" (p. 16). Moreover, there was a similar finding from the Education Review Office. "In schools where ERO found good practice, there was strong leadership for gifted and talented education" (2008, p. 49). As such, leadership appeared to be used as an inclusive term to mean not only principals, but also a

knowledgeable and enthusiastic "designated co-ordinator or team" (p. 9). Similarly, Horsley came to this conclusion in her study (2006) and refers to this focus on leadership as "Principle # 4: Involve your Principal in your project" (p. 73). Many research respondents claimed that "schools or projects, in which the principal led the vision, were able to obtain staff buy-in and commitment for the scheme, which in turn lead to the generation of positive outcomes" (p. 73).

The importance in fully engaging senior management in gifted education was acknowledged by both the research and the cluster management. This joint finding recognised the clear advantage in having the principal on board to ensure this priority was actioned and filtered through the school. Junior, the newest cluster member, viewed leadership more from the angle of collegial respect for each other. There was no hierarchy in the management model so all principals were considered on the same level. He remarked that he "liked not being made to feel inferior or adequate by the others. It was just accepted where we were in our leadership journey" (p. 42). Thus, the management body essentially was a leadership unit. The terms were in effect interchangeable. Management and leadership were one and the same. The fact that the principals did not separate the units out is a strong indicator in their personal allegiance and belief in the wholeness of the cluster. These synonymous concepts inferred a distinct educational synergy. It is a relevant finding. The cluster was not just managed, but directed by leaders with authority, influence, and foresight.

3. Professional development as a key determinant to effectiveness

The key finding on the effectiveness of the cluster, and the role of management within, was the clear-cut importance of professional development. It was a major factor in determining the performance of the provision and the potent of the principals to direct a programme relevant to student need. Moon and Rosselli confirmed the imperative need for a specialised education programme for upskilling practitioners teaching or working in the field of giftedness: "Professional development has been recognised as one of the seven key directives for gifted education, and there is empirical evidence that teachers who receive training are more effective with gifted students than those who have not received training" (2000, p. 513). The cluster principals recognised the deep and wide-

ranging value of professional development. Furthermore, they were clear and conclusive in their articulation that this was a critical element to the success of their project in rural New Zealand. Riley (2003) indicated that in her survey of rural schools, thirty-eight percent of the principals identified professional development as a priority and, notably, one-quarter surveyed acknowledged their desire to observe other New Zealand models. The Education Review Office (2008) clearly stipulated the relevance of growing teacher expertise to improve outcomes for gifted and talented students in New Zealand schools. Keen reinforced the importance of linking teacher knowledge to a place-based programme: "Effective provision for the gifted is contingent upon an informed knowledge, among planners and providers, of the context within which that provision will take place" (2004, p. 263). Therefore, one of the key elements that made professional development effective in the rural district was the practitioner proficiency, informed by experience in cluster provision. The internal documentation on the cluster triangulated the evidence, accentuating the importance of building human capability in schools and the cluster. The Cluster TDI Story (2005) emphasised that over time, there was obvious "a passionate commitment and thirst for knowledge" (Report to Ministry, p. 11). This enthusiasm for gifted education visibly grew among the Management Group and those involved with the co-ordination.

Furthermore, the multiple references to the advisor facilitating courses in the region, by all six participants, made an emphatic point that this educationalist was a catalyst for prioritising professional development for the teachers in the cluster. All agreed that her advice was invaluable and practical. "She would look at what we were doing and she would align it with research and best practice" (Chebz, p. 28). As Riley and Moltzen enforced: "Professional development and support is necessary in the implementation of comprehensive approaches to gifted and talented education" (2010, p. 147). Anaru acknowledged her positive influence: "She was quite important too while we were establishing our Management Committee, when we were really finding our way for a start, making mistakes" (p. 6). This statement is endorsed by Riley and Moltzen's assertion that "professional development must be planned, responsive, needs-based, and flexible" (2010, p. 147).

Conversely, Junior came from a deficit perception because he missed out on the foundation-building time when the other principals made the most of the opportunities to become 'experts' within the cluster. "I would have enjoyed opportunities to be involved with the Advisor and University Lecturer … it is one thing that would have made my input possibly better" (p. 29). Professional development was a primary focus for all the principals, teachers, and co-ordinators in the cluster. As such, it was a key enabler for the quality of the entire provision and the growing of knowledge capital within the schools of the district. Hence, the power of professional development is a significant finding for this research. It was instrumental in shaping the direction and policy of the Management Group in correspondence with the type of child-centred programme delivered. Noteworthy, professional development ensured the principals were on the same level of understanding for their philosophy, which in turn, informed the effectiveness of their decision-making.

In sum, a conclusive finding from this study is that professional development was the primary tool for embedding philosophy in schools and enhancing practice in the cluster programme. Professional learning was the overriding consideration for the effectiveness in empowering the principals. This practitioner education filtered through to a strengthened knowledge base from which to make sound decisions premised on authentic theory. Moreover, the cluster's validation for the focus on professional development was strongly backed up by a good deal of New Zealand research (Horsley, 2006; Riley, 2004; Riley & Moltzen, 2010; ERO, 2008). Thus, professional development made a positive difference because it was contextualised to place; it was underpinned by gifted education theory; it was delivered by experts in the field; and it was long-term to enable the development of links between theory and practice.

4. *The development of the team for effective practice*

Collective development was heralded in the principals' frequent maxim, "We got better at it." This oft-heard saying best represented their view on the cluster's effectiveness as an organic and evolving journey of progress. While this phrase signified "a collective perspective of those present" (Clough & Nutbrown, 2008, p. 91) at the focus group, it was an important statement from their management

perspective. Hence, this statement from the Education Review Office has resounding resonance for this project. "When clusters of educational institutions worked together to share knowledge and to provide consistency in provision, schools were better informed about the gifts and talents of their students" (2008, p. 51). Within the data, there were continual references made to the effectiveness of the cluster programme, as well as remarks testifying to the overarching efficiency of the co-ordination and supervision. These critical comments were intertwined throughout the focus group text. One memorable phrase stood out on the value for schools involved in the cluster. Anaru declared: "Clustering was the way that we could do the best for those children" (p. 9). These statements point to the running theme of evidence proving that the cluster was seen as a successful innovation for gifted education provision. The principals perceived the cluster model as effectual because it met the needs of small schools by pooling resources into a bigger, cohesive project.

Correspondingly, the urban-rural mix enhanced the social aspect for all the children interacting and learning together. Hunta, the principal of a remote one-teacher school believed that his students would miss out as the school did not have the roll size or sufficient number of staff to provide for the exceptional students. This school did not have the capacity for adequate provision on its own and would hold onto the cluster as long as possible. An urban principal, now working out-of-the-region, saw effectiveness in light of sustainability. "Everyone's taken away from it … so it will have ongoing impact" (HB, p. 43). Success was exemplified as the power to pass on the learning and embed informed practice, wherever the school might be. In this way, the positive influence was ongoing and rolled out to new areas or new schools. Furthermore, the cluster was held in high regard in the local schools and the wider community with a range of district principals applying to the Management Group for inclusion. This never eventuated but was reflective of the esteem for the cluster. The independent viewpoint proved a good litmus test for the calibre of the cluster. Thus, the finding from my research is that gifted provision is more impactful and far-reaching when working together, rather than alone. In conclusion, the model was an effective mechanism to provide supportive and sustainable education for gifted and talented students.

5. Negative issues to be resolved by management

From the results section, two negative issues came to the fore for the Management Committee to deal with during the life of the cluster. The first small anomaly was the difficulty in linking theory to classroom practice. This was only considered to be a minor disadvantage, and one that possibly testified more to the complex nature of the cluster than a real breakdown in practice. The second controversial matter within the partnership proved to be stressful with far-reaching ramifications for cross-cluster working relationships. In retrospection, the principals appeared philosophical about the outcomes although the incongruent financial reporting was a contentious debate for a long time. At one stage, the divergence in perspectives nearly sabotaged the professional relationship between the two parties. The data firmly suggested that at the end of the TDI, the principals considered setting the operation up in a cluster school as the fund holder. Such drastic action never eventuated and the status quo remained. Throughout this discordant process, the Management Committee worked together as a strong team never deviating from their desired outcomes for an amicable resolution. Consensus and open discussion marked the way of collegiality. The only recommendation mooted by the principals was to look at drawing up a Memorandum of Understanding between the partners; however, this did not actually happen.

6. Sustainability of the model and replication in other settings

The other performance indicator testifying to the worth of the cluster was the replication of the prototype in other parts of the region. Anecdotally, the principals told of the model being established in other areas, both regionally, and in the South Island of New Zealand. The original cluster model is now duplicated in three other rural school districts in the region, and another REINC has reproduced the framework for their own version. Probably the greatest evidence of sustainability is the fact the cluster is still functioning in 2011 using a restructured format with the amalgam of two school groups. Significantly, under the auspices of REINC as a preferred provider, the region now has three large school clusters working separately in their own autonomy, but within an extended Ministry of Education contract for 2011. The cluster has 'rippled out' beyond its original enclave to new horizons. This finding for the study clearly shows the

strength and the applicability of the model to be adapted in other communities. The transferability of the cluster is evidence of its ongoing and extensive effectiveness, not only locally, but in out-of the-region contexts.

6.6   The key findings on the ethos of the cluster

In sum, there are four specific findings on the cluster's ethos:

1.   *The child-centred philosophy*

Keen's research (2004) was applicable because it corresponded to the cluster mantra of the child at the hub of the provision: "Feedback suggests that schools working effectively in the area of gifted education invest a great deal of effort in generating such an ethos" (p. 273). The strategy of centralising the gifted student appeared to arise from the Management Group's growing awareness of the immense benefits for those coming together with like-minded children. The discovery that the affective side of these intellectual students needed nurturing was influential and caused a change in the principals' thinking. There was ample New Zealand research endorsing the importance of providing socialisation experiences for gifted children, so that they could find acceptance with intellectual peers and also strengthen self esteem (Taylor, 2004; Rawlinson, 2004; Moltzen, 2004; ERO, 2008). The growing responsiveness to gifted needs resulted in the tilting of the programme to better accommodate the socio-emotional aspects of children's personal development. Their emotional sustenance became a priority so that these learners did not become stereotyped as 'tall poppies,' and hence ran the risk of hiding their gifts from sight. Thus, the extended finding is the principals' recognition of the imperative to grow and support student self confidence, actually underpinned their child-centred ethos. This was the abiding principle at the core of their creed. The child-centred perspective was integral for answering the third research question to identify what exactly the principals regarded as important for their cluster.

2.   *Passion and commitment*

The second key finding for the third research question is that passion and commitment were two essential ingredients to the collective strength of the management model. "When people have a passion and a purpose that is theirs, not

someone else's, and when their passion is pursued together, and is sharpened by a sense of urgency, there are no limits to what they can achieve" (Hargreaves & Fink, 2006, p. 255). This sense of community was the undercurrent of collegiality linking members to their "common cause" (Hunta, p. 8). It imbued the concept of working co-operatively. HB attempted to define the intangible quality, which was so important to them all:

> Within the group you know, the collegial support that we provided for each other, in and outside of that time, you know, it was pretty good for us, wasn't it? I think you just need to see, we hadn't seen each other for a while, you know, it's still there. (HB, p. 34)

3. The team approach

The solidarity and strength of the group was emphasised by Keen in this statement: "Lateral and vertical networking between centres and schools, to facilitate collegial support and the sharing of experience and best practice in relation to gifted education, is richly productive and should be encouraged" (2004, p. 283). There existed a feeling of co-operation instead of competitiveness between schools. The attitude was, "What can we get for these kids, rather than what can we get for me and my school?" (Chebz, p. 9) Another principal agreed: "There was never any jealousy between schools" (HB, p. 12). The co-operative spirit and the strong sense of 'team' was a crucial component. It was the cog connecting the colleagues to each other.

> The team approach was critical to the success of the programme. A supportive collegiality has developed. Cross-fertilisation of ideas is a focus and very valuable. All are very involved and enthusiastic about planning for the best interests of their students and school communities. (Cluster Report to Ministry of Education, 2005, p.4)

4. Collegiality and camaraderie

Highly visible in the transcript was the clear enjoyment of each other's company within the focus group forum. The repartee sparkled with rapid fire responses and quick interjections. The dialogue illustrated many instances where the participants finished one others' sentences, or spoke in unison. The linguistic features of the text therefore conveyed the revelry and liveliness of the speakers comfortable in

the presence of one another. Chebz put her finger on the pulse of what really mattered to the management leaders:"I think it was having such a high level of trust around the table and I have to say that with the camaraderie, the decisions were very easy to get to" (p. 22). Hargreaves and Vink concurred in their belief: "Trust works. It improves organisations, increases achievement, and boosts energy and morale" (2006, p. 215). HB confirmed the consensus on the importance of comradeship. "Well you struck on it – that camaraderie – the fun we had in administrating and doing it was one of its successes" (HB, p. 22). This friendly social interaction was spotlighted in the cluster's TDI Story. "The team approach was critical to the success of the programme … The Management Group is very supportive of each other and buddy up for extension beyond the programme" (Report to Ministry of Education, 2005, p. 10). Thus, the principals cared, and it showed.

The strong sense of collegial camaraderie was the phenomenological "lived experience" (van Manen, 1990, p. 36). It was the essence, the 'quality' that was recognised in retrospect, the lingering feeling after time apart. Indeed, the evolving ethos of togetherness was at the very centre of the management model and the cluster paradigm. "It was something that we all embraced. That, that generosity of spirit between each other" (HB, p. 12). In phenomenological terms, togetherness can be conceived "as a special kind of experience … in which universals or general essences are grasped" (Warnock, 1970, p. 31). Thus, from the ethos emanated a sense of enhancement and betterment for all within the cluster. "We got better at it" was the mantra. Together, they were better was the creed. 'Always with you; never without you' was the code of collegiality.

6.7   Summary

There are two main findings to answer the first research question into the particular ways the cluster was managed in a rural region. In both instances, there is evidence to show that collaboration was seen as the key to the functioning of the cluster. Firstly, the prototype had started as a small-scale pilot to solve the issues around isolation and operated between three schools in the pre-TDI era. It was a proven model ready to be adapted to accommodate more members. This demonstrated the predisposition towards the unification of rurality and clustering

into a regional way of working. Notably, the principals affirmed that there was greater power and impact for schools when co-operating together, rather than individually. In addition, the model of the cluster had the ability to be duplicated to other school districts in the region and other rural areas in New Zealand.

The second key finding is the recognition of the importance attributed to the strong professional relationship with an external agency. The active partnership with REINC was critical to the success of the cluster project. Most significantly, a strong emphasis was placed by all the principals on the competency and efficiency of the co-ordination role. Leadership therefore encompassed both management and facilitation. Furthermore, the principals were all resolute in their belief that the cluster was an effective and applicable model to deliver a high quality provision for gifted and talented students. This finding was supported by the fact the Management Group and REINC implemented a sustainable programme lasting long after the TDI project ended.

Noteworthy, the finding to address the second question on performance of the management model and the effectiveness of the cluster is simple. In sum, the answer is premised on the critical importance of professional development. Teacher and practitioner education informed the overall quality of the practice. Professional knowledge was in effect the tool to underpin bold management policy-making and strengthen the proficiency of co-ordination. This resulted in the implementation of a well-planned and differentiated programme. Yet, the impact of the generation in cluster knowledge rippled out even further. Professional development contributed directly to a child-centred culture exemplified by fostering self confidence through the togetherness of like-minded learners. Interestingly, the child-based culture mirrored the collegial character of the larger cluster community.

To conclude and in answer to the last research question strand, the finding most significant to the special ethos of the cluster was the ever-present spirit of collegiality. The camaraderie was imbued with a pervading sense that the principals were together, better and more effective. They were the 'Cluster Team.'

In this light, the provision was an exemplar of collegiality in New Zealand gifted and talented education.

CHAPTER SEVEN

CONCLUSION

7.1   Introduction

In a perfect gifted and talented world, there would still be the need for a cluster. This is because a cluster can not only fill in the gaps of inequitable and uneven provision, but offer something rich, lively, and colourful to the field of practice. One key finding suggests that it is a model in education for those who aspire to come together to provide for gifted children beyond the gates of their school. Research by Riley (2003) affirmed the recognition by schools surveyed that: "Twenty-five percent felt there was a need for models and ideas specific to gifted education in New Zealand" (p. 23). As evidence, the focus group participants acknowledged their conviction in the cluster's effectiveness as a mechanism of provision. The data clearly showed that they believed their model not only worked, but worked with finesse and fitness of purpose. Furthermore, the fact that the model was sustainable and continues to function nine years later reinforces their confidence in the power of clustering. This blueprint was based on the spirit of co-operation among like-minded leaders. The cluster, by essence of its nature, was grounded on the art of collaboration and the sustenance of human interrelationships. In effect, the story of the data tells of a discovery. These principals in rural New Zealand realised their management approach reflected an affiliation to their regional community. This was their crusade to make a difference to the lives of students with exceptional promise. "What's best for the kids?" was at the epicentre of the provision, just as, "We got better at it" was the mark of the cluster's effectiveness. Although there was a gap in the research and literature base on comparable models, this study is a vignette of a collegial style of effective gifted education provision. A glimpse into an innovative project is presented through the perceptions of the principals in their commitment to support children fulfilling their potential.

The problem of isolation is relevant to other parts of provincial New Zealand, not just the region in this study. Thus, rurality is not exclusive to this particular group

of schools, as national statistics show that around thirty percent of schools can be classified as rural (Riley, 2003). Yet, very little literature was found on provision for rurally gifted students, either in New Zealand or other places of the world. There is limited published material to show that a cluster, or some form of collaboration, is a method used by other school groups to overcome the disadvantage of dislocation from centralised opportunity. Indeed, there was no comprehensive research on similar types of provisions for gifted students. No evidence was found on management models premised on school leadership involving senior staff. The inference from this paucity of supporting literature is that this way of working was specialised and quite rare. Yet the crack in the evidence-based theory becomes a chasm when the factor of external facilitation is added to the model of a principal-directed cluster. From a national perspective, the overall solution of a conjoint venture seems unique in the Aotearoa-New Zealand context of provision for gifted and talented students. This summation also applies to the field of gifted education internationally, as no hard evidence was found to point to similar modes of formalised collaboration addressing the special needs of exceptional children. Therefore, this thesis is offered as an original contribution to fill the void in the research base for models of practice in New Zealand gifted and talented education.

7.2   The research questions

The study focused on three key areas and examined the ways in which the cluster was managed; the applicability of the management model as a mechanism to provide for gifted and talented children; the ethos binding the management leaders to the philosophy and practice. In critique of the appropriateness of the research questions, two main aspects were visible within the research design. Firstly, the questions were not only relevant to the topic, but responsive to the production of informative data. Secondly, the sequencing of the questions in a hierarchal order provided a wider angle to the generic look at the management signature of the cluster. This perspective narrowed to filter into the focus on effectiveness of the model. Lastly, there was a close up scrutiny into the core principles of working together. There is however, one small flaw to be acknowledged by the researcher. Whilst there were three strands of investigation, the third part really only needed one question honed specifically on how the principals viewed the ethos of their

cluster. This would have simplified the analysis and been more clear-cut in approach for the methodology. Nevertheless, these inquiry categories did provide a strong flow structure to the setting of the interview schedule questions, which seemed to help the spontaneity and openness of the responses. Chebz pointed out this feature: "When we talked about one thing, we found we covered about five or six others," (p. 44). Thus, the research questions were relevant and proved to be sound instruments in generating thick, rich data for analysis. The findings from the data are organised in correlation with the themes arising from the three research question strands.

7.3   The ways of management for the cluster

The first section of the data analysis focused on the general approach to direct and oversee the cluster. This responsibility for the supervision was premised on the management group as a mechanism through which the school leaders could make well discussed decisions informing the philosophy and policy of the TDI contract. At this point one slight anomaly was present in the data. Throughout the forty-four pages of transcript, there were only a couple of references to the Talent Development Initiative scheme. Arguably, this was only a semantic characteristic pertaining to titles; yet it does raise the issue concerning how the principals actually perceived the project. It would seem that 'the cluster' was the dominant linguistic feature used to describe all the operations, the programme, and hence the whole practice. The TDI part of the provision was referred to more in connection with "the Ministry" providing a "monitored fund" (HB, p. 4), or the contractual requirements attached to milestone reporting for "outputs" (Anaru, p. 10). The impression is that the TDI scheme was in the background, and the cluster forefront as the predominant force. There was certainly consensus on the funding acting as a fortuitous impetus to not only drive the project, but to finance the opportunities for professional development, the learning programme, and a small allocation of co-ordination hours. The only other alignment with the TDI was in respect to the advisor acting as mentor to link into the national state of play for gifted education at that time. It was clear that all participants did acknowledge the benefits of the six year funding; however, the cluster seemed to be the overarching paradigm of reference. This is further evidenced in the sustained life of the cluster beyond the Ministry of Education funding support.

Integral to the Management Group were two critical factors. Firstly, the committee was made up of principals or senior staff, which enabled the management team to make decisions and action without the need for further authorisation. Secondly, this decisive leadership style was a landmark feature and filtered into the democratic approach to cluster supervision. Consensus was the team's self validation for effective direction and policy. Each school had one vote around the table as did the REINC personnel. Invoked was the strategy of egalitarianism to ensure the sharing of authority and power. The research, although scant, does testify to the value of a committee representing a group of stakeholders in an advisory capacity (Riley & Moltzen, 2010). Relevantly, the distinct composition of the management model, with its upper-most echelon of leadership, signalled the importance placed on the TDI Cluster and the high profile of gifted education within the school communities. The principals combining together as a unit, was regarded in the data as "good practice" (Hunta, p. 40). This perspective on the power of co-operation was clearly endorsed by quite a range of literature sources, particularly those relating to the New Zealand context.

Nonetheless, the key determinant to their collaboration was the addition of REINC, which resulted in both parties working to their strengths in unison. This was the specialised part of the model and the driver to all aspects of the project. There was a large body of evidence from the literature review to strongly indicate the significance and priority of the co-ordination role. The Education Review Office (2008) recognised the advantages of having a designated person to lead and support a school's provision. The following excerpt represents the advantage implicit in not loading the schools and busy principals with an extra set of tasks for the administration. "We could brainstorm, go away, do some organisation, come back; it would be put together and we then could walk away not having to worry about it, because it was going to get done" (HB, p. 41). However, one distinct point is that there was no mention in the literature of any other model resembling this bipartite relationship, thus suggesting that this was a unique approach for an innovative TDI project. Furthermore, this co-constructive way of working in partnership was reflective of the traditional community-mindedness found within this rural region.

7.4   The effectiveness of the cluster

The effectiveness of a cluster managed by principals and co-ordinated by REINC is a constant theme. Moreover, the evaluation of performance and practice is interwoven throughout the data responses. In this case, the individual perceptions merged into a unanimous perspective. The conjoint view was that they collectively improved as time went on. This statement is one such example of how the principals judged their learning and experience: "The last few years the practice has become kind of entrenched in the schools. (Babe: That's exactly right. And we're getting better and better…) mm. Proven practice" (Hunta, p. 38). A spin-off from the cluster was the step forward for the schools to use the model to grow their own teacher confidence and professional capacity. Babe summarised the progress in her school:

> The cluster was so important. The networking, the going to other schools, the sharing. That was great and so now we're at the stage where we're running things ourselves, within our own school and embedding practice there. And that's all from this cluster. (p. 38)

The key strand underpinning the success of the management model was the programme continuum of quality professional development for the principals, the teachers, and the co-ordinator. Professional development made a clear contribution to lifting the standards of teaching in the cluster schools. Just as significantly, professional development improved the quality of differentiation within the cluster programme. In the later TDI years, there was evidence of targeted acceleration, as well as general enrichment of student learning. This finding is supported by a large quantity of New Zealand theory, practice, and research (Apted et al., 2007; ERO, 2008; Clark, 2009; Hartnell-Young & Neale, 2006; Horsley, 2006; Keen, 2004; MoE, 2000; Moltzen, 2004; Riley et al., 2004; Riley & Moltzen, 2010). The volume of supplementary theory was a stand-out feature, so this is testament to the paramount importance of practitioner education to inform teaching capability and raise student outcomes. Tributes were paid by all focus group participants to the rich value of professional advice from 'significant others.' These academic specialists laid the foundations for developing a child-centric approach to the programme and a student voice for evaluation. By virtue of this mentoring support and professional development, a far stronger concept of giftedness evolved. Such a place-based philosophy better

recognised the heterogeneous nature of the students in the diverse range of cluster schools. The foundations were set for a specialised definition sensitive to multicategorical qualities, befitting the management's inclusive ethos. Giftedness embodied the values of the communities and enacted the cluster's own brand of effective 'talent development' based on the region's uniqueness. This finding on the refinement of a construct of giftedness epitomised the forward-thinking and adaptable dimensions of leadership. It was a sign of their effectiveness as a management group and a cluster.

7.5   The ethos of the cluster

The finding to underpin the ethos suggests that the notion of humanism sat at the centrepiece of the cluster. Collaboration was portrayed as not just about working together, but interacting in a meaningful way. There was a sense of only being as 'good as each other' emanating from the data, and that the cluster was bigger than them all. Just as important was the powerful impression that the cluster concept of inclusiveness embraced all the parts of the leadership unit. This togetherness was espoused as the oneness of the 'Cluster Team.' The forged bond was reminiscent of the well known battlecry of The Three Musketeers: "All for one and one for all" (Dumas, 1884, p. 105). New principals were welcomed into the community and an effort was made by the other members to bring them up to speed on policies and kaupapa. "We'd programme something for new people who came into the group. Sit down, kid, and have a sandwich (laughter) before L. gets to you" (HB, p. 33). Babe appreciated the gesture whereby she was given "some lovely folders to read on all the initial Management Committee meetings" (p. 30). A touchstone of the leadership was the evident warmth and support for each other, regardless of the membership experience.

Correspondingly, as part of the researcher's self reflexive practice, one informed comment can be made. The high spiritedness, so obvious in the quick-fire responses and the fun-loving approach to the focus group, did replicate the Management Group meetings. The rapport was reproduced. In the transcript, there were many mentions of laughter, interjections, and aside comments. This linguistic pattern of banter suggested ease and spontaneity in each other's company. Hunta jokingly recalled that: "We had some behavioural issues … the

REINC Manager used to make HB sit beside her (laughter) … Slap him about (giggles)" (p. 30). These bi-term meetings were formal, insofar as the usual protocols of an agenda and minutes were adhered, yet conviviality tempered the proceedings. "Oh the lunches were good! (laughter)" (Hunta, p. 22). This extract from the REINC Manager in the Cluster Story confirmed the revelry with the principals and REINC staff.

> The management group meetings are incredibly satisfying, stimulating and fun. They are always humorous for the director, who is dealing with the principals, each of whom come out of school, work hard and play hard (particularly the boys in the back row!!!) (Report to Ministry of Education, 2005, p. 11)

The hallmarks of the cluster ethos were the warm personal relationships and the sense of collegiality. The community was built on professional trust and the culture was founded on togetherness for a common cause. The growing sense of collective self and evolving belief in their shared capability were unique qualities to this model. Remarkably, the human element was the gravitational force holding the cluster tight together. The passion of the management leaders was the élan at the centre to bring about change for the betterment of gifted children. It was the extraordinary ingredient. The anthropologist, Margaret Mead (1928), perhaps put it best: "Never doubt that a small group of thoughtful, committed individuals can change the world. Indeed, it is the only thing that ever has." The cluster leadership was a purveyor of change within a New Zealand world of talent development.

7.6 Limitations of the research

Inevitably, as with all research, there are limitations to the interpretations of findings. The key areas that exist in regard to this study are outlined below:

- The clear, but unavoidable, conflict of interests with the researcher as a cluster participant made for critical ethical implications. Methodology had to be put in place to lessen writer bias and the likelihood of the researcher 'colouring' the participants' responses for the data;

- As a part of the study was premised on an evaluation of the cluster provision, the nondisclosure of identity was of the utmost importance for the protection of participants, their schools, and the region of the cluster;

- This research was from the perspective of only one side of the contract partnership in the cluster. Hence, no opportunity was given to counterbalance with a REINC point of view;

- There was no inclusion of any other groups compromising the cluster, for example: students, teachers, or parents;

- There was no focus on the cultural perspective of Māori giftedness;

- The lack of relevant research-based literature was a constraint to contextualising and informing this study; and

- The time lapse of over two and a half years since the culmination of the cluster as a Talent Development Initiative means the study may even be considered "ex post facto" research (Cohen, Manion & Morrison, 2007, p. 264), where the inquiry is done retrospectively.

7.7   Future implications and recommendations

This study has opened up several areas of focus which could benefit from new research in the future. This need for research-based models is especially important in New Zealand because of the dire lack of exemplars of 'good practice' to learn from and possibly emulate. Most of these recommendations arise from this cluster case study, but are also informed by wider theory and research in the field:

- Participatory action research as an evaluation of the effectiveness for the replicated models of gifted and talented education within the region;

- The tracking of the cluster alumni gifted and talented students through the medium of individual case studies;

- Research investigating the long-term effects of the cluster on the direction of principals in relation to what is happening post-TDI for gifted and talented education in their schools; and

- Research into the conceptualisation of a paradigm of giftedness unique to Aotearoa-New Zealand looking at an inclusive, all-rounded approach.

7.8 Conclusion

This case study, with its phenomenological orientation, suggests that the cluster is a model of sound practice to fit a paradigm of gifted education in rural New Zealand. Furthermore, the management group is a workable model for other school consortia to use and modify as a template. In regards to the Talent Development Initiative project, the notion of passing the knowledge and passion forward was an underlying precept. The ideal was to extend the learning from innovative exemplars and to grow a stronger theory base. The world would then be transformed for the gifted students at the centre of their own personalised education. Fittingly, this research goes a small way towards fulfilling the original TDI aim. Furthermore, the study will be put forward to accept the challenge by Riley (2003) for New Zealand educators to discover ways of meeting the needs of gifted and talented students. In this way, they may well become the world's cartographers for that roadmap. The suggestion is that the TDI Cluster does deserve a place as a model of good practice on the educational chart for rural New Zealand.

For any other group of schools and principals intent on taking their own journey, there are seven key ingredients to pass on as accumulated wisdom from the founding TDI Cluster:

1. Strong leadership is crucial to a successful committee. Passion, commitment, and consensus are the essential elements to a workable collaboration;
2. Outside facilitation is critical to weld the group into a strong and productive unit;
3. Good funding is necessary;
4. Children are at the centre of the philosophy of gifted education;
5. Professional development is most important;
6. Each group should create their own definition of giftedness; and
7. Collegiality and camaraderie are the 'extraordinary' qualities to bond a leadership team together.

In the steps of their predecessors, perhaps a new group "will learn the trick of standing upright here" (Curnow, 1943, p. 400) with their own self identity befitting contemporary Aotearoa-New Zealand. This home-grown model is strong and significant with the potential to adapt to the waxing and waning of gifted education in New Zealand. The cluster is not perfect; it has its own faults and flaws. Yet this world of the cluster shimmers with energy and exhilaration, so that the gate once opened, will never be closed again.

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MASSEY UNIVERSITY

30 April 2010

Ms Karen Bush
Karaka
RD2 Ngatapa
GISBORNE 4072

Dear Karen

Re: HEC: Southern A Application – 09/53
The ethos of clustering: A case study to evaluate a management model as a mechanism to provide for gifted and talented children in rural New Zealand

Thank you for your letter dated 28 April 2010.

On behalf of the Massey University Human Ethics Committee: Southern A, I am pleased to advise you that the ethics of your application are now approved. Approval is for three years. If this project has not been completed within three years from the date of this letter, reapproval must be requested.

If the nature, content, location, procedures or personnel of your approved application change, please advise the Secretary of the Committee.

Yours sincerely

Professor Julie Boddy, Chair
Massey University Human Ethics Committee: Southern A

cc   A/Prof Tracy Riley   Dr Marg Gilling
     School of Curriculum & Pedagogy   School of Educational Studies
     PN900   PN900

     Dr Alison Kearney, HoS   Prof Howard Lee, HoS
     School of Curriculum & Pedagogy   School of Educational Studies
     PN900   PN900

     Mrs Roseanne MacGillivray
     Graduate School of Education
     PN900

INFORMATION SHEET: FOCUS GROUP

The ethos of clustering: A case study to evaluate a management model as a mechanism to provide for gifted and talented children in rural New Zealand.

INFORMATION SHEET FOR FOCUS GROUP

As part of the research process and the academic requirements for my Master of Education Thesis through Massey University, I am planning to investigate the effectiveness of a school cluster's management group model for the provision of education to gifted and talented students in a rural area of New Zealand. Critical to my research focus will be the perceptions of the cluster members in their appraisal of the performance and value of this management template. Overseeing my research procedure are two recognised Massey University Supervisors, Associate Professor Tracy Riley, and Dr. Marg Gilling. Within the academic world of New Zealand, these two university lecturers have much high level research experience in their given areas of expertise: Tracy is internationally acclaimed in the field of gifted and talented education, and Marg, amongst other things, is a renowned social science researcher. If you wish to have further clarification concerning this proposed research, please feel free to contact my supervisors: Associate Professor Tracy Riley (Telephone: 06 350 5799 Extension 8625); Dr. Marg Gilling (Telephone: 06 356 9099).

The subject and site of my proposed research is that of the cluster. This project came under the auspices of the Ministry of Education's Talent Development Initiative with which you, and your school, have been actively involved over the 2003–2008 era. As a school leader of the Management Group, I warmly invite you to take part in my research as a participant in the focus group Interview at the Hotel on ***Friday, 23 July, 2010*** (3pm–5.30pm). Your active contribution to this research study would certainly be much appreciated.

To provide you with essential background to this research, here is a brief overview outlining the main direction and intentions of my investigation. Basically, the key purpose of this inquiry is to examine your perceptions as the school leaders. This exploratory research is designed to find out if you think this management model was a suitable and relevant way to support the needs of gifted children within your cluster schools. The focus will be centred on the management practice and kaupapa of this cluster. This description will then sit alongside an evaluation of the 'way of doing' of the Management Group. Therefore the research aim is to gauge whether you, as a school leader, deem this to be an applicable educational approach that fits a rural New Zealand context. So in other words, this research will be an analysis of how effective the management leaders perceive their model to be as a mechanism of provision. The findings may perhaps go some way towards throwing light on whether this cluster may possibly be considered as an exemplar of best practice for gifted and talented education in New Zealand.

To this end, this research will be a case study and will consist of four phases: a review of the literature; one focus group interview; a reappraisal of the focus

group transcript for participant verification, and an analysis of the documentation as a TDI Cluster. Prospective participants have been invited on the basis they represented one of the nine schools in the Management Group that operated over the last three years as an 'Enhance Talent Development Initiative.' Schools, and school leaders, will not be named or identified in this study. Most importantly, in order to ensure confidentiality, 'Informed Consent' will be requested of participants interviewed in the focus group. The main priority for the interview is to gain deeper understanding into your viewpoint on what you believe were the integral ingredients to the management of the cluster project during the 2006–2008 timeframe.

During the focus group, the following themes may be explored:
- The rationale behind the establishment of this cluster enterprise;
- The journey of the cluster into the realm of gifted and talented education with an historical overview of the development and progress made;
- The cluster's concept of giftedness, and the philosophy that guided the practice;
- The mode and style of management, along with the collaboration processes for the co-ordination and delivery of the programme;
- The importance of working relationships and group dynamics: the qualities and attributes needed;
- The relevance of leadership to the ethos of this cluster;
- The significance of professional development for the quality of classroom teaching to meet the needs of gifted and talented students;
- The overall effectiveness of this management model: the successes, the issues, and the resolution strategies to solve the problems confronting the cluster;
- The indicators to show changes in teacher practice within the classrooms of individual schools;
- The possible ongoing effects of this model of clustering;
- The 'culture of the cluster' developed over the six years of operation;
- The highlights, lowlights, and memorable moments of the TDI Cluster;
- The key principles to working collaboratively as a management group of leaders; and
- The core essence to the leadership way of thinking and 'being' of the TDI Cluster.

To assist the interests of impartiality and objectivity, an independent interviewer will facilitate the focus group session. Using this approach, a potential conflict of interest as the Project Manager-Director of this cluster and the actual researcher, should be averted. In this way, any inherent bias and possible 'colouring' of the important primary data should be reduced. As a means to protect you as research participants, neither you, nor your school will be named and identified in this thesis. Pseudonyms will be used to safeguard your anonymity.

The focus group forum will be digitally-recorded and then transcribed by an independent recorder for analysis. Your participation is conditional on this basis and indicates your consent to be audiotaped for the purposes of this research. The transcript of the interview will be made available to you for checking of accuracy and for further comment. It is important to note though, this opportunity to edit

the script applies only to your personal input, and not the dialogue of fellow participants. Non-return of an amended text within seven days will be taken as acceptance of the transcript as it stands. Once my research thesis is written up and completed, all data will be stored in a secure location on site at Massey University for a period of five years. The analysis and findings of this research will only be used for the purpose of submitting my thesis to the university for academic approval, and for any further publications and presentation opportunities that may arise in the future. Finally, when the thesis is completed and available for release, a copy of the summary will be sent to you, on request.

However, it is essential to be informed that once this research is published there will be a change in regards to the guarantee of anonymity for your school cluster. As a participant, it is important that you are made aware that your cluster will be named. This means that the TDI Cluster will then be identifiable within the educational and public domains, not only locally, but nationally. Whilst your identity as a Management Group leader will remain protected, there is a chance that your school may well be recognised as a cluster member. Please note that this background has been made available to you in the interests of 'Informed Consent.' You are under no obligation to accept this invitation to become part of the research process, In your role of participant, you have the right to:

- Decline to participate;
- Decline to answer any particular questions;
- Withdraw from the study at any time;
- Ask any questions about the study at any time during participation; and
- Provide information on the understanding that your name, or that of your school, will not be used.

This project has been reviewed and approved by the Massey University Human Ethics Committee: Southern A, Application 09/53. If you have any concerns about the conduct of this research, please contact Professor Julie Boddy, Chair, Massey University Human Ethics Committee: Southern A; telephone 06 350 5799 extension 2541; email humanethicsoutha@massey.ac.nz .

I would be most grateful of your participation in my research study. To help compensate for your involvement, a small fund is available to make a contribution towards the cost of travel to attend the focus group Interview.

If you are willing to be part of this project, please sign the focus group consent form and return in the enclosed envelope to the above address by ***3 July, 2010.*** Should you have any questions regarding this research, please do not hesitate to contact me.

Thank you so much for considering this invitation to participate in the Focus Group; your input will greatly assist my Master of Education thesis.

Yours sincerely

Karen Bush (Researcher)

PARTICIPANT CONSENT FORM FOR FOCUS GROUP

The ethos of clustering: A case study to evaluate a management model as a mechanism to provide for gifted and talented children in rural New Zealand.

<u>FOCUS GROUP PARTICIPANT CONSENT FORM</u>

I have read the Information Sheet and have had the details of the study explained to me. My questions have been answered to my satisfaction, and I understand that I may ask further questions at any time.

I agree not to disclose anything discussed in the focus group.

I agree to participate in this study under the conditions set out in the Information Sheet.

Signature: .... Date: ....

Full Name - printed ....

FOCUS GROUP INTERVIEW SCHEDULE

The ethos of clustering: A case study to evaluate a management model as a mechanism to provide for gifted and talented children in rural New Zealand.

To the leaders of the Cluster circa 2007 – 2008

Welcome to this focus group at the Hotel on Friday, 23rd July, 2010. Due to the ethical constraints of my being classed as an 'insider researcher, J. is stepping into the breach to facilitate this interview forum.

Sincere thanks to you all for participating in my Master of Education Thesis research project. Your presence is greatly appreciated by me, as your researcher. Please do help yourselves to refreshments, kick back, and enjoy 'the research experience.'

AGENDA

- Origins and history of the cluster;
- Issues unique to the region;
- Aims and rationale of the cluster;
- Cluster philosophy and concept of giftedness;
- Resourcing and Ministry TDI funding;
- Structure, mode, and dynamics of the TDI Cluster;
- The roles of the Management Group and REINC;
- Professional working relationships and interaction: enablers and limitations;
- If there were tensions or differences, what were the processes for working through these issues?
- Changes over time, if any, in the Cluster-REINC collaboration and way of working;
- Evaluation of the effectiveness of the Management Group model: strengths and weaknesses;
- Applicability and relevance of the cluster to addressing the needs of gifted and talented children;
- Appraisal on whether aspirations and expectations were met;
- Sustainability and any ongoing effects of this Cluster initiative, within the region and/or beyond;
- Ethos and 'essence' of the Management Group – what was at the centre holding the Cluster together?
- In hindsight, is there anything you would have done differently, or changed?
- How did you find this focus group Interview experience?
- Other comments?

GLOSSARY

ERO: Education Review Office

Kai: Food

Kaupapa: philosophy

Manaakitanga: Caring for; hospitality

MoE: Ministry of Education

REINC: Rural Education Incorporated

TDI: Talent Development Initiative

Whanau: Family