A CONSTRUCTIVIST GROUNDED THEORY STUDY OF INTERCONNECTED FRAMEWORKS OF HEALTHY AND INCLUSIVE SCHOOLS

by

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Abstract

Inclusion of students and comprehensive school health are two important social and public policy frameworks that impact educators on a daily basis. What gets implemented and what makes sense in schools is not without complexity. Implementation of education policies occurs in a high-stakes accountability environment. From a policy and practice outlook, schools in New Brunswick are being asked to implement both frameworks. If schools are to be effective in implementing and sustaining both, it is important to examine how they are connected, to understand the ongoing work to ensure inclusive and healthy schools, and to give a clear direction for realizing both.

The purpose of this study is to identify the connecting factors in healthy and inclusive high schools by using a constructivist grounded theory approach to examine the interrelated frameworks. Twenty-one participants from five high schools that performed well on indicators of inclusive education and comprehensive school health were interviewed over a period of six months. Interview and extant data were analyzed to answer the broader question. Findings from this study provide support for a Foundational Relatedness Theory and the intentional and purposeful fostering of teachers' need for relatedness, contributing to healthy and inclusive schools. This study highlights the responsibility of policy makers as well as district and school leaders to provide the structures and processes to intentionally support the need for connectedness and professional learning to meet the needs of both schools and individual educators.

Keywords: inclusive education, comprehensive school health, health promoting schools, constructivism, constructivist grounded theory, relatedness, connectedness, Self-Determination Theory, Foundational Relatedness Theory

Dedication

This dissertation is dedicated to those who have inspired and encouraged me to take risks, not to give up and know that in every challenge lies an opportunity:

To the dedicated educators who work tirelessly every day to support the children and youth of New Brunswick. The engagement and passion with which they approach their profession results in safe and welcoming learning environments for students and adults alike.

To the amazing women whom I count amongst my dearest friends, who have cheered and supported me in every step of this journey. I am humbled by your love, strength, and spirit.

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Chapter I: Introduction

Background

Today's world is constantly evolving, and the field of education is changing at an ever-increasing rate. Traditional notions of education are giving way to fundamentally different, more innovative ways of thinking about how we learn, teach and acquire knowledge, while ensuring high standards for all students (Council of Ministers of Education Canada, 2019; Eaton, 2010; Fullan, Hill, & Crevola, 2006). Political accountability and economic reality are exerting increasing influence over the field of education. In difficult economic times, education systems are under mounting pressure to show greater accountability and effectiveness. Teachers face challenges trying to balance children's physical, social and emotional needs with academic learning, while at the same time preparing them for the global economy of the 21st century.

There is a growing recognition that education is the major socio-economic driving force of the 21st century. A workforce of creative, entrepreneurial, highly skilled, digitally competent and globally-ready individuals is increasingly being recognized as the foundation for a nation's survival (Boix-Mansilla, 2017; Eaton, 2010; New Brunswick Department of Education - Anglophone, 2010, p. 3). The mastery of the basic skills of reading writing and math, although essential, is no longer enough. Canada's Council of Ministers of Education (CMEC) is focusing on global competencies in our classrooms and the role played by provincial and territorial ministries of education to go beyond graduating students who are only academically prepared. If we accept that we need to prepare students for a different future than we have known, then our understanding of the focus and purpose of education needs to shift.

Purpose of Study

Many schools today are becoming increasingly diverse. While increased diversity may be a given, healthy and inclusive schools are not. Comprehensive school health and inclusive education are critical frameworks essential to meeting the diversity of needs within a school community. They are two important social and public policy frameworks that impact educators, in particular administrators and teachers, and students on a daily basis. Both frameworks, however, require closing the gap between research and practice.

Health and education are interdependent: healthy students are better learners and education impacts health (Veugelers & Schwartz, 2010). A student who is not healthy, who has undiagnosed learning disabilities or difficulties, or who comes to school hungry will not benefit from the education process and all that it has to offer. Schools are facing huge pressure to increase academic performance while at the same time teaching a population of students with increasing physical and mental health needs. According to the Center for Disease Control and Prevention (2016, as cited in Ludwig, 2016), if left unchecked, today's generation may be the first in two centuries to have a shorter life span than their parents. Additionally, the Mental Health Commission of Canada (2013) reports that over 800,000 Canadian children and youth experience mental health concerns, an undeniably staggering statistic.

This study investigated the interconnected frameworks of healthy and inclusive schools using a constructivist grounded theory approach, to identify what educators in New Brunswick high schools do that results in healthy and inclusive learning environments. More specifically it asks, "What are the connecting factors in healthy and inclusive high schools?" This study is of particular relevance to educators who work

diligently every day to provide a highly effective learning environment for all students, and to policy makers who develop and monitor implementation of key policy frameworks.

Both inclusive education and comprehensive school health, it can be argued, lay the foundation for lifelong learning and community participation. Some may question the interrelatedness of both frameworks. Are they competing for time and resources in an ever increasing fiscally strapped environment? If schools are to be effective in implementing and sustaining both, it is important to examine how they are connected and how they are being implemented. Much research and scholarly discourse exists independently about inclusive education or comprehensive school health; however, to date, no one has explicitly studied the connecting factors between the two. To do so, I needed to build a theory, one that was grounded in the data to connect inclusive education and comprehensive school health.

To answer the question of what connects healthy and inclusive high schools, key questions explored how participants defined both frameworks, what they look like it in practice and what is needed to create them. I examined how educators shape and maintain an environment that is both healthy and inclusive for all its learners, and what they do and see that results in successful implementation of both frameworks. It was also important to understand how schools managed change within to become healthy and inclusive. Appendix E provides an overview of the semi-structured questions asked to participants to guide the interviews. Applying the interrelated frameworks of both healthy and inclusive schools in an applied research study provided insight into the contributing factors and processes that connected them. Further, the use of a constructivist grounded

theory approach allowed me to explore in depth the meaning of the data to allow for informing policy and practice.

Participants at five schools, identified as healthy and inclusive, were interviewed over several months and extant literature was studied to explore the underlying interconnecting factors between the two frameworks. You are referred to the method section of chapter three for criteria that define how schools were identified.

Chapter 2 provides the reader with an overview of the literature pertaining to inclusive education, particularly within the New Brunswick Education system and of comprehensive school health. The chapter provides definitions and identifies provincial policies that support the focus of this study. Chapter 3 presents an overview of the methodology and research design used in this study. The focus of this chapter is to ensure trustworthiness in the approach taken in asking the research question, and in the process taken to gather and analyze the data. Chapter 4 presents the results of this research study and highlights the core categories that connect inclusive education and comprehensive school health. It presents the constant comparative and theoretical analysis required to arrive at the constructivist grounded theory to support the foundational underpinnings of healthy and inclusive schools. In Chapter 5, discussion on the theory is enhanced by a micro-literature review. The trustworthiness of the research is discussed along with practical applications for the education system. The chapter concludes with a summary of the study, implications and recommendations for future research and policy development.

Chapter II: Literature Review

Overview

Chapter Two provides a review of the literature, definitions, and respective policies pertaining to inclusive education and comprehensive school health. For reasons that will be expanded on in the following methodology chapter, an additional micro-literature review will be presented in the discussion chapter, Chapter 5. This chapter concludes with connecting and integrating the literature on inclusion and comprehensive school health, along with limitations and implications for educators.

Inclusive Education

While much research has been conducted on inclusive education, there is no single, agreed upon definition across jurisdictions. The lack of a consistent definition leads to confusion and division in the field, and makes generalizability of research findings difficult. All Canadian provinces and territories, as well as many American states and European countries purport to have an inclusive education system; however, operationally inclusion can look very different. Many jurisdictions consider the least restrictive environment for students with exceptionalities to be in special education classes with integration where possible. Others, including New Brunswick, view inclusion as educating students with exceptionalities in the general education classroom, now often referred to as the common learning environment (The Department of Education and Early Childhood Development, 2009).

Some jurisdictions are further along in the journey than others. For some, the fight for inclusive education is centered on allowing students with disabilities the basic right to attend school and receive an education, while others have expanded the term and the

journey to encompass a broader array of students, their families and their communities, acknowledging that students are multi-faceted and not defined solely by disability.

The growing movement towards inclusive education demands a clear definition of what inclusion is and how it is implemented in schools. The inclusion debate, philosophical and practical, must be moved forward in ways that enable schools and education systems to plan, implement, monitor and evaluate their approaches to inclusion. Many may not challenge the vision or philosophy of inclusion, but how we get there is often contested. Moving the debate forward is important in considering the elements of classroom practice that could address the needs of all, including those identified as having diverse needs. The discourse has begun to move from a *why* approach to one of *how*. How this is done on a daily basis presents ongoing challenges for individual teachers, pupils, parents, principals, schools and the system as a whole. This requires structural changes to organizations, curriculum, teaching and strategies, without which inclusion does not occur (Hehir, Grindal, Freeman, Lamoreau, Borquaye & Burke, 2016).

New Brunswick is recognized both nationally and internationally for its model of inclusive education. For the purposes of this dissertation, I will focus on the journey and the definition of inclusion endorsed by the New Brunswick, Canada, Department of Education and Early Childhood Development (2010).

Historical Journey.

The vision of inclusive education in New Brunswick was built and evolved over time. Inclusion has moved through several stages: segregation, integration, mainstreaming and inclusion. Prior to 1952, under the School's Act, schools in New

Brunswick had the power to exclude students with mental disabilities or severe physical disabilities. It was the responsibility of parents to provide education services for such children (MacKay, 2006). During the 1970s and 1980s, the governments of the day began assuming responsibility for all children, including those with severe disabilities. However, it was not until 1984, that the Department of Social Services (currently the Department of Social Development) announced the closure of the Dr. William F. Roberts Hospital School in Saint John, which had been providing education to those with disabilities. The children were then returned to their home communities (G. Porter, personal communication, November 3, 2011).

In 1986, for the first time in New Brunswick history, the New Brunswick Government passed a unanimous bill in the Legislative Assembly. Bill 85, which has become known as the Inclusive Education Bill, was passed by all legislators who represented all political parties of the day. It mandated that all children in New Brunswick were entitled to free and public education, and that all children, regardless of ability, were to be educated in the regular classroom (MacKay, 2006).

Progression of Inclusive Education.

This past year marked twenty-five years since the release of the UNESCO document, known as the Salamanca Statement. The internationally recognized document became a catalyst for many countries to move forward in supporting inclusive education. The Statement begins with a call for "Education for All". The guiding principle of the document is that schools should accommodate all children, regardless of their physical, intellectual, social, emotional, linguistic or other conditions.

> [Inclusive schools] are the most effective means of combining discriminatory attitudes, creating welcoming communities, building an inclusive society, and achieving education for all; moreover, they provide an effective education to the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system (UNESCO, 1994, p.xi).

From a human rights perspective, there was a sense of urgency to meet the EFA goals by 2015 (Opertti, Brady, & Duncombe, 2009). Governments were being urged to review content and concepts from the last twenty years, in particular equity and quality. Reports such as the MacKay Report on Inclusion (MacKay, 2006) and reform initiatives such as United States No Child Left Behind Act of 2001 (NCLB) added momentum to the discussion. However, fifteen years after the goals were set, two-thirds of the 164 countries who agreed to make education for all a priority were unsuccessful. UNESCO has extended its targets with the proposed overarching goal to "ensure equitable and inclusive quality education and lifelong learning for all by 2030" (UNESCO, 2016). Educational policies and reform initiatives alone cannot guarantee the successful inclusion of students with exceptionalities in general education classrooms (Mitchell, 2014; Obiakor, Haris, Mutua, Rotator & Algozzine, 2012; P. Peterson, personal communication, November 1, 2010.) Factors that play a role for successful inclusion include: effective leadership and administrative support, effective implementation systems, availability of evidence-based interventions and supports, stakeholder involvement, and adequate professional development for teachers and paraprofessionals (Mac Ruairc, Ottenson, & Precey, 2013; Powell, 2006; Roach & Salisbury, 2006).

As for progression in New Brunswick, there are no more special classes or institutions, and all students are enrolled in a common learning environment at their neighbourhood school. On the national and international stage, this model of inclusive education is held up as an example to which other jurisdictions should aspire. Schools and districts in New Brunswick have shown that it is possible to achieve excellence in education while practicing inclusion by focusing on instructional methods, professional learning for their staff, collaboration among the different stakeholders, and the conviction that all students can succeed (MacKay, 2006).

The province of New Brunswick released its current definition of inclusion in May 2009, based on a three-year consultation process with educators and advocacy stakeholders. The release of the 2009 New Brunswick definition of inclusive education represented a significant shift in recognizing and addressing the needs and strengths of students with diverse needs. Historically, as was and is the case in most of the world, inclusion was entrenched in a medical/deficit model. The new definition broadens its scope to encompass all students with diverse needs including, but not limited to, those who are gifted and talented, First Nations, Lesbian, and Gay, Bisexual, Transgendered, and Questioning (LGBTQ). The vision is one of an evolving and systemic model of inclusive education where all children reach their full learning potential, and decisions are based on the individual needs of the student and founded on evidence (The Department of Education and Early Childhood Development, 2009). Tara Flood (2019) of the United Kingdom's Alliance for Inclusion Education called New Brunswick's legislation on inclusive education a "game changer" and stated that "such action would be required in any country for an education system to be inclusive." Most recently, the

New Brunswick inclusive education system was recognized by the United Nations Special Rapporteur on the Rights of Persons with Disabilities as one of the best in the world and a role model for other countries (United Nations Human Rights: Office of the High Commissioner, 2019).

According to the New Brunswick Department of Education and Early Childhood Development (2009):

> Inclusive education is a pairing of philosophy and pedagogical practices that permit each student to feel respected, confident and safe so he or she can learn and develop to his or her full potential. It is based on a system of values and beliefs centered on the best interests of the student, which promotes social cohesion, belonging, and active participation in learning, a complete school experience, and positive interactions with peers and others in the school community. These values and beliefs must be shared by schools and communities. Inclusive education is put into practice within school communities that value diversity and nurture the well-being and quality of learning of each of their members. Inclusive education is carried out through a range of public and community programs and services available to all students (p. 1).

The complexity and diversity of classrooms and students in the 21st century places increasing demands on the classroom teacher to provide effective and inclusive educational programming and instruction. To meet these demands, government departments, districts and schools must adopt evidence-informed professional practices, skills, and knowledge.

Effective Inclusive Schools.

Despite a philosophical acceptance of the principles of inclusive education, there is an undeniable disparity in the literature addressing how to bridge the gap between research and practice (Prima-Farrell, Bain, & McDonagh, 2011; McLeskey, Waldron, Spooner & Algozzine, 2014; Thomas, 2013). It has been suggested that this is because research has not been designed to make practical differences, and in order to influence the research to practice (RTP) gap, three factors must be present: usability, accessibility and the trustworthiness of the research (Grima-Farrell, Bain, & McDonagh, 2011). Hoppey and McLeskey (2014) characterized effective schools by two categorical themes: school culture and organizational qualities; and social instructional qualities. School culture and organizational qualities include schools having a unifying vision, shared decision-making, and distributive leadership. Social instructional qualities include high quality instruction and high quality, job embedded, professional development. To have the maximum benefit, students must also have access to effective classroom and school environments and reasonable accommodations and individualized supports must be provided (Hehir et al, 2016; Sugai, Simonsen, Branshaw, Horner, & Lewis, 2014). However, just being exposed to content and information does not guarantee learning. As discussed by Causton and Theoharis (2014), not only is leadership key for effective inclusive schools, there must be a presumption of competence. In other words, not asking, “Can this child be successful?”, but instead asking, “How can this child be successful?”.

Conceptualizing Comprehensive School Health

Schools have the mandate to provide education and are widely considered as a logical setting for promoting healthy behaviours (Veugelers & Schwartz, 2010). Given the multi-layers and associated influences within schools, a health curriculum alone is not sufficient to develop healthy living among children and youth (Lauren Denise Sulz, 2014). A comprehensive school health approach can help address the multi-layers and complexity.

This relationship between health and education forms the basis for the World Health Organization's (WHO) Health Promoting Schools (HPS) framework, an approach that looks at the whole school environment (Langford et al., 2014). According to the World Health Organization (2015), a health promoting school is one that is constantly strengthening its capacity, and one that strives to foster health and learning. Furthermore, a health promoting school engages relevant government and community partners and stakeholders in efforts to make the school a healthy place; strives to provide a healthy environment for students and staff; and implements policies and practice to respect an individual's well-being and dignity (WHO, 2015). For many years, frameworks and programs that promote school health within the school environment have been seen as the way to meet the United Nations commitments to health and education for all students (WHO, 1997).

Comprehensive School Health (CSH) is a framework for promoting wellbeing in school communities and encouraging life-long engagement in healthy living practices (Fulwiler, 2014). It is an internationally recognized integrated approach to school-based health promotion involving a broad range of programs, activities, and services which take

place in schools and their surrounding communities (Joint Consortium for School Health, 2013). Similar frameworks to CSH may be called Health Promoting Schools or Coordinated School Health frameworks (Fulwiler, 2014). A health promoting school or a CSH school is one that is constantly strengthening its capacity as a healthy environment for living, learning and working (WHO, 2014). Proponents of comprehensive school health advocate a holistic approach, supporting improvements in students' educational outcomes while addressing school health in a planned and integrated way (Joint Consortium for School Health, 2013).

Over the last two decades, research on health promoting schools has focused on three major areas. The first focused on research that linked health and education, thereby confirming a rationale for the framework (Rowling & Jeffreys, 2006). The second area concentrated on establishing guidelines, while the third examined indicators to determine if the guidelines were being met (Samdal & Rowling, 2011). Since 2005, a four-pillar framework has been promoted by the Pan-Canadian Joint Consortium for School Health (JCSH). The Pan-Canadian JCSH identified four pillars for Comprehensive School Health: social and physical environment; teaching and learning; school policy; and partnerships and services. Due to its relationships with both health and education sectors across 12 provinces and territories, the JCSH is positioned in Canada to provide a forum to create a greater vision for comprehensive school health (CSH) and its evaluation of relevant indicators (Veugelers & Schwartz, 2010). The JCSH (2012) focuses on providing information and support to member governments and being a catalyst for collaborative actions. Each of the nine provinces and three territories provide updates as part of an annual

report as to how they are integrating comprehensive school health within their public schools.

Within a comprehensive school health framework, it is important that elements of all pillars be implemented to realize its potential (Veugelers & Schwartz, 2010 as cited in Fulwiler, 2014, p. 19). Each of the four pillars must be integrated and implemented in order for comprehensive school health to be successful. Implementation and sustainability in a community require tools to be tailored to the needs of the community.

Connecting and Integrating Inclusion and Comprehensive School Health

The goal of healthy, inclusive schools should be the achievement of better outcomes for all students, both academic and non-academic. Education, health and social outcomes are closely interdependent, and education is a strong predictor of quality of life and lifelong health (Murray, Low, Hollis, Cross, & Davis, 2007). Healthy students make better learners, and better learners make better communities (Marx, Hudson, Deal, Pateman, & Middleton, 2007). A whole school approach is best when promoting inclusive education and school health (Lavis, 2014). The following section aims to provide an overview of connecting factors of comprehensive school health and effective inclusive education, and to highlight similar research and scholarly discourse in the areas of healthy and inclusive schools. Wherever possible, New Brunswick policy and context will be highlighted.

Policy.

Government, district and school policies include the themes of leadership and decision-making processes, in addition to guidelines and procedures that impact how programs and services are implemented and evaluated in schools and their communities (Morrison & Peterson, 2013). In New Brunswick there are a minimum of eleven policies

within the Department of Education and Early Childhood Development that directly impact schools and students. Of particular note are the policies pertaining to inclusive education (Policy 322); protection of students (Policy 701); positive learning and working environments (Policy 703); health support services (Policy 704); and healthier foods and nutrition in public schools (Policy 711). Policies for inclusion provide guidelines for environments, learner variability, supports for inclusion, resource allocation, and individualized student plans. Policies pertaining to health and health services include guidelines for school environments, curriculum development and safety standards, as well as routine and emergency medical care within schools and on school grounds.

Educational Leadership.

The quality of leadership makes a significant difference to school and student outcomes. In many parts of the world, including both developed and developing countries, there is increasing recognition that schools require effective leaders and managers if they are to provide the best possible education for their students and learners (Bush, 2009). The demands for more effective schools have placed increasing attention on the role of the school leaders. Leadership is critical, and is the foundation for change at the school, teacher and student level (Dufour & Marzano, 2009; Fullan, 2014; Leithwood, 2012;). A teacher's relationship with the principal and their perceptions of their principal as a leader have a major impact on school climate (Dufour, Dufour, & Eaker, 2008, p. 302).

School leadership is the driver for change (Fullan, 2014, p. 172). Evidence suggests that second only to the influences of classroom instruction, school leadership affects student learning (Lapointe & Davis, 2006; Leithwood, Seashore Louis, Anderson,

& Wahlstom, 2004, p. 3-5; Stymiest, 2016). This requires not only trained and committed teachers but highly effective administrators. However, effective leadership cannot be realized by one individual. It is most effective when carried out by a small group of educators, with the principal as the catalyst and the cohesive force (Dufour & Marzano, 2009; Fullan, 2014; Hattie, 2009; Marzano, 2003).

As educational leaders within the 21st century, principals will be leading the way for strategic change. Research suggests that years of experience is a predictor of the effectiveness of a principal (LaPointe & Davis, 2006). This presents a challenge as according to the Canadian Teachers' Federation (2004) the estimated turnover rate for Canadian teachers in the first five years of their teaching career is thirty percent.

Social and Physical Environment.

There is a direct link between the school environment in which student learning takes place and success in schools (Ontario Ministry of Education, 2010). According to the Joint Consortium for School Health (2013), the social environment is defined as: "the quality of the relationships among staff and students in the school, the emotional well-being of students, as well as the attachments that students have with their families and members of the wider community". The physical environment includes the buildings, play spaces and grounds within and surrounding the school. The social and emotional environment pillar is organized along the theme categories of: physical and emotional safety, school and classroom climate, and the use of physical spaces. All children have a legal right to be safe and protected in schools, including those with diverse needs. This applies not only to physical safety, but emotional/psychological safety (Morrison & Peterson, 2013). Access to buildings, classrooms and playgrounds for some children can

present a challenge and can impact not only access to social relationships and learning, but also the sense of belonging that is so important for a student within an inclusive school community (Bucholz & Sheffler, 2009).

A sense of belonging and school connectedness has a significant impact on reducing at-risk behaviours and provides a protective factor for children and youth (Chapman, Buckley, Sheehan, & Shocket, 2013). Examination of the theoretical underpinnings of school connectedness include attachment theory, social development and social control theory. Questions have arisen as to whether modifying the learning environment could result in a better outcome.

Mental Health.

A growing concern for schools today involves what appears to be an overwhelming number of students and families who experience mental health challenges. Mental health refers to the social, emotional and behavioural well-being and is considered an integral part of healthy development (Kamrad, 2009). In Canada, the evidence suggests that between 14 to 20 percent of children have a significant mental concern (Clinton, 2009). This means that a staggering number of students have difficulty going to school, enjoying friends, and developing their skills and knowledge. Lack of success at school causes discouragement, leading to less effort and loss of self-esteem, which causes failure, which in turn causes further discouragement (Kamrad, 2009).

During the consultation phase of the Strengthening Inclusion, Strengthening Schools Report of the Review of Inclusive Education Programs and Practices in New Brunswick Schools stakeholders reported mental health as a growing concern in New Brunswick schools (Porter & AuCoin, 2012). Out of those that expressed concern, many

of them felt that teachers did not have the necessary training and knowledge to program effectively for these students and that more educators and other professionals were needed (2012, p. 63). The wait times for students needing treatment can be lengthy, and for those who do receive treatment and who are in the process of recovering and developing lifelong coping strategies, integration back into the school system is often a barrier (Weir & Mann, 2009).

Risk factors for children to develop mental health issues can be within the child, within the family and within the environment. Risk factors are associated with poor mental health (Lavis, 2014). Conversely, protective factors that build resilience in children can reduce the risk. These factors can include: high levels of self-esteem, having a good support network and positive relationships, as well as access to strong academic and non-academic opportunities (Lavis, 2014). Additionally, it is important not to negate the importance of a child's individual characteristics, and the recognition that risk and protective factors are variable and can fluctuate over time (Doll, Jones, Osborn, Dooley, & Turner, 2011; Nickerson & Fishman, 2013). Reports such as *Connecting the Dots* (2008) and the *Ashley Smith Report* (2008) have stated that there is an impetus for stakeholders and agencies to work together to develop, implement and monitor a plan for those students impacted.

As a result of these reports, an Integrated Service Delivery (ISD) model has been developed to ensure collaboration among the departments of Education, Health, Social Development, and Public Safety. The mandate of ISD is to ensure the positive growth and development of children and youth with multiple needs, through departmental collaborations that are formally integrated and systematized. A child or youth-centred

approach is used to develop and implement appropriate interventions based on the strengths, needs and risks of identified children and youth (Department of Education and Early Childhood Development, 2015). The ISD model has been rolled out across all New Brunswick school districts and health regions since 2018 and implementation continues. The challenge will be to integrate all services in a way that is measurable and sustainable. A key factor in that process will be effective educational leadership.

Instruction and Learning for All.

In preparing students for the 21st century, there is an additional challenge of developing and/or updating curriculum that is designed to meet the needs of all students. There is concern that curriculum delivery for students with exceptionalities may be seen as a retrofit, an afterthought, and not strategically planned out (Hehir et.al., 2016; Tanyi, 2016).

Universal Design for Learning (UDL) is based on the premise that there is no one kind of learning. Learning differs across tasks, development and individuals. A curriculum that is designed with UDL in mind is one that is able to better address the needs of all students. It is not one size fits all but provides alternatives for everyone; not added on later but designed from the beginning; and not access for some, but access for everyone (Lord Nelson, 2014; Rose, Meyer, & Hitchcock, 2005; G. Meo, personal communication, September 30, 2010). Universal Design for Learning allows for multiple means of representation, action and expression, and engagement (Rose, Meyer, & Hitchcock, 2005), thus taking differentiation to the next level (Baker-Korotkov & Bastin, 2019). Whereas differentiated instruction often occurs on the spot for an individual child, UDL planning is up front and is available for all students.

Having all students attend their common learning environment for the majority, if not all of their instruction can pose challenges to many educators. Teachers are asking how to meet the variety of needs within their classrooms while at the same time ensuring consistency and high-quality planning and programming. Concerns arise as to how to balance a standards-driven approach and one that is functionally-based. Research will argue that it is not a "one or the other" scenario, but that students will benefit from a balance of both (Ayres, Lowrey, Douglas, & Sievers, 2011). As quoted by John F. Kennedy in his June 1963 civil rights address:

> …not every child has an equal talent or equal ability, or equal motivation, but children have the equal right to develop their talents, their abilities, and their motivation (Library of Congress, 1963).

Relationships – Partnerships and Services.

Strong relationships among students, schools, parents and communities provide a foundation upon which to build a culture of caring within a school. Bringing together partners and stakeholders from diverse backgrounds and experiences strengthens a school's community network. Cavanagh, Macfarlane, Glynn, and Macfarlane (2012) suggest that establishing a culture of care within a school is a responsive approach to building trustful and respectful relationships, and for repairing relationships that have been harmed. For many children, one positive relationship can be a significant protective factor and decrease risk (Morrison & Peterson, 2013).

Shifting Paradigm or Expanding Paradigm

With the 2009 New Brunswick definition, inclusive education has moved from a single focus on students with disabilities to foci that are more encompassing of diversity

and the variability of all learners. It refers to the education of all children, not just those with disabilities. Is it sufficient to say that inclusive education and comprehensive school health are connected by the comprehensive school health four pillars, or can the paradigm of inclusive education be expanded to include comprehensive school health? A paradigm shift can be defined as a fundamental change in approach or underlying assumptions. Given this definition, what are the key assumptions associated with inclusive education and comprehensive school health? Education is universal and according to United Nations Convention on the Rights of the Child, Article 28, all children have the right to a good quality education (United Nations, 2015). In New Brunswick, the provision of inclusive education is based on three complementary principles or assumptions: (1) public education is universal – the provincial curriculum is provided equitably to all students and that is done in an inclusive, common learning environment shared among age-appropriate, neighbourhood peers; (2) public education is individualized; (3) public education is flexible and responsive to change (The Department of Education and Early Childhood Development, 2009).

Limitations

Examination of the literature proved challenging at times, and a lack of relevant, contextual research provided obstacles in drawing conclusions. In addition, inconsistency around the definition of inclusion and inclusive education, impacts the generalizability of research results. There is a need to shift from supporting the philosophy of inclusion to operationalizing inclusion in a way that is measurable. Much of the research pertaining to comprehensive school health has been conducted in the United States, and there has been limited research conducted in Canada that addresses and measures achievement of

encompassing CSH indicators. Finally, there is a lack of research that examines the connecting factors for healthy and inclusive schools. While initially this appears as a challenge, it does offer an opportunity for conducting original research within an inclusive education jurisdiction.

Further challenges included a lack of research or scholarly articles on an integrated approach to school health. The majority of the research studies viewed focused on a single aspect, often, healthy eating, physical activity or school connectedness. A final obstacle is the lack of literature that provides a broad understanding on student achievement and success. Much of the research tends to be focused on viewing achievement as academic achievement, excluding other indicators such as functional curriculum achievement, sense of belonging, positive relationships, and so on. Of particular note, there is a lack of research being conducted with a focus on high schools in both inclusive education and comprehensive school health.

Theoretically, while it may be premature to conclude that the four pillars connect both inclusive education and comprehensive health, examination of the literature suggests that there may be some connecting factors. Future research requires consideration of the current findings. Examination of the literature can assist in developing and constructing a new model to account for the relationships and to guide implementation. In particular, implementation theory needs to be explicit, so that administrators and teachers know which policies and best practices are required to implement with fidelity and integrity (Rowling, 2011).

Implications for Educators

As schools entered the second decade of the 21st century, there was an increasing emphasis on the importance of setting high standards for all learners and augmenting the level of accountability expected of educators. Increased pressure is being felt at state and provincial levels, as well as district, school and classroom levels, to demonstrate that growth is occurring, and progress is being made and maintained. However, even the most robust academic curricula cannot overcome health barriers to learning. Coordinating the resources of education, health and social development agencies can assist schools with attaining positive student outcomes in the following areas: improving health knowledge; improving attitudes and skills; improving health behaviours and health outcomes; improving educational outcomes; and improving social outcomes (Marx, et al., 2007). Published achievement results, the giving or removal of funding, and merit pay for teachers are all issues adding to the already mounting pressures for teachers and administrators. While some may welcome accountability strategies, they need to be effective, be fairly implemented and achieve meaningful results (A. Clark, personal communication, October 29, 2014); Dargusch & Charteris, 2018).

As researchers continue to explore and examine inclusive education and CSH, it is the classroom teacher who must implement and evaluate programs, and recommendations. The promise of accountability is its focus on student learning. Accountability for accountability's sake is in no one's best interest. If educators are to be held responsible, then they must also be equipped with the resources and tools they need to do their job well (Chiner & Cardona, 2013; Hehir et al., 2016; Singal, 2019). The challenge in defining and ensuring accountability is that there must be clear expectations

and clear goals for improvement. Teacher accountability has had negative connotations in the past and was seen as punitive. New approaches focus on professional development and personal growth as a way to foster classroom success. There is also the recognition that teachers do not control all the variables; families and communities have a role to play, not only in learning, but in the social-emotional well-being of students.

It is essential that a theoretically sound approach be conceptualized to assess inclusive education, comprehensive school health, and their connecting factors. Assessment of the integration of the four pillars across both frameworks would allow schools and districts to self-evaluate where they are in terms of alignment and measurement of outcomes.

Summary

Chapter two provides a summary of the literature on inclusive education and comprehensive school health and the factors that connect the two. The definition of inclusive education as defined within New Brunswick provides an essential context for this research study, as it is encompassing more than disability. The research highlights those factors that appear to connect the two frameworks, but it also confirms that a research to practice gap exists. A theoretically sound approach to assess both inclusive education, comprehensive school health and their interconnected factors is needed in order to build on the existing literature to inform future practice and policy.

In the next chapter I present the research design for this study including methodology and methods used. Terms associated with constructivist grounded theory are defined and as referenced above, the positioning of the literature review is expanded upon.

Chapter III: Research Design

Overview

In this chapter I introduce grounded theory as a methodology and provide an overview of my reasons for choosing constructivist grounded theory for this research study. I describe the design of the study including data collection and analysis, outlining the following elements: theoretical sensitivity, coding, theoretical sampling, constant comparison, theoretical saturation, and analytic memos. I then examine the ethical considerations and locating myself within the context of the research, and the impact of this to theoretical sensitivity. This chapter concludes with an overview of the questions I hoped to address.

Methodology: Grounded Theory

Originally developed by Glasser and Strauss (1965, as cited in Charmaz, 2009), grounded theory is often accepted as a methodology that helps researchers understand psychological and social processes (Lal, Suto, & Ungar, 2012). Its purpose is not to test theory but to develop theory inductively (Kvale & Brinkman, 2009), and to generate a theory that is grounded in the data (p. 202). The objective of grounded theory is to explain the data through a discovery process of constant comparative analysis, and not a process that is forced. Instead of starting out with a theory and proving it, its purpose is the discovery of theory from the data being examined and analyzed.

Historical context.

Among the most recognized qualitative methodologies are phenomenology, ethnography, narrative inquiry, and grounded theory (Lal, Suto, & Unger, 2012). Grounded theory and its methods emerged from the collaborative work of Barney G.

Glaser and Anselm L. Strauss (1967). Their work came at a time when qualitative research methods were under attack for a lack of systematic processes. Given their divergent backgrounds - Strauss was a qualitative sociologist and Glaser had a background in descriptive statistics - their pairing was somewhat unusual at that time. Their research explored the kinds of interactions that occur between dying patients and health care professionals, under what conditions and with what social characteristics (Glaser & Strauss, 1967). As a result, their research produced a demand for more information pertaining to their methodology. They responded by authoring *The Discovery of Grounded Theory,* (1967) in which they offered practical guidelines and proposed that qualitative analysis was not only logical but could generate theory. Prior to their work, a major complaint of qualitative research was that it was being framed with quantitative language and processes; grounded theory advanced qualitative research by making it systematic. The crucial components for grounded theory practice include: simultaneous data collection and analysis; code and category construction; using the constant comparative analysis; and conducting the literature review after the analysis of data (Higginbottom & Lauridsen, 2014). Unlike other inquiry approaches, data collection and analysis occur concurrently, not in a linear manner. The guidelines and procedures for grounded theory research are often compressed within a single reference text (Charmaz, 2014, Glaser & Strauss, 1967, Corbin & Strauss, 1990).

Since the initial development of grounded theory, Glaser and Strauss have taken divergent paths in its use. For the most part, Glaser remained committed to the fundamental tenets of grounded theory as a set of prescribed, explicit steps from which the researcher must not veer. Strauss, however, moved towards collaboration with Juliet

Corbin (Corbin & Strauss, 1990). In classic (or purist) grounded theory, Glaser and Strauss posit that theory emerges from the data separate from the scientific observer. In constructivist grounded theory, however, a key assumption is that neither data nor theories are discovered. Instead, researchers are part of the world they study and the data that they collect. They *construct* grounded theory through "past and present involvements and interactions with people, practices and research practices" (Tan, 2010). This element was key to my decision to choose grounded theory as my methodology and will be elaborated in the final section of this chapter. Charmaz's approach and that of other constructivist grounded theorists explicitly assumes that any theory development is an interpretation of the studied world, not an exact picture (Charmaz, 2009; Guba & Lincoln, 1994).

Theoretical Perspective.

The theoretical roots of grounded theory can be traced to American pragmatism, and to the works of Herbert Mead and John Dewey. Their work is critical to the development of symbolic interactionism, which is commonly associated with grounded theory (Lal, Suto, & Unger, 2012). Specific to symbolic interactionism and relevant to grounded theory is that the meaning that individuals assign to physical, social and abstract objects determines their actions towards the objects; individuals generate meaning for objects during interactions with others, and individuals continuously interpret situations and their interpretations influence action (Flick, 2002; van den Hoonard, 2015). The object or thing has no intrinsic meaning except for the ones that we give it. Key to symbolic interactionism is the premise that we cannot examine the actions of an individual without also considering the social context in which the individual exists.

According to Blumer (1969), the symbolic interactionist position consists of three key assumptions:

1. Human beings act toward things on the basis of the meanings that things have for them.
2. The meaning of such things is derived from, or arises out of, the social interaction that one has with one's fellows.
3. These meanings are handled in, and modified through, an interpretive process used by the person in dealing with the things he encounters (p. 3).

Social interactionism also assumes that language is the necessary mechanism for meaningful knowing and acting, and that a person can only know oneself through relationships with other people. Meaning is interpreted through language and communication that is shared (Charmaz, 2014).

Choosing Constructivist Grounded Theory.

My decision to choose constructivist grounded theory as my methodology was measured and deliberate. Constructivism is a theory about knowledge and learning, describing what "knowing is" and how we "come to know" (Mills, Bonner & Francis, 2006; Fosnot, 2005). As stated by Catherine Twomey Fosnot, theory is described as "knowledge not as truths to be transmitted or discovered, but as emergent, developmental, non-objective, viable constructed explanations by humans engaged in meaning making in cultural and social communities of discourse" (2005, p. 86). What sets constructivism apart from other cognitive theories is the Piagetian idea that what we call knowledge has an adaptive function. Constructivism assumes: (1) that knowledge is constructed; it is not merely a stimulus response, but an active interpretation, (2) learning

is an active process; learners explore and actively interpret their environment, versus being acted upon, and (3) objective truth is unknowable; people actively explore the world and construct their own unique understanding and objective reality. This approach allowed me to have insight as to what was occurring in high schools, not just what I thought was happening. Since constructivist grounded theory reveals the lived reality of the participants, the approach would potentially impact the way high schools are structured to meet the needs of all students and staff in a heathy and inclusive manner.

Constructivists generally do not begin with a theory; instead they inductively develop a theory or pattern of meanings (Creswell, 2003). A central tenet of constructivist grounded theory is to give voice to participants (Charmaz, 2014). The use of semi-structured interview questions in this study provided opportunities for participants to share their voice, that is, their thoughts and opinions on inclusive education and comprehensive school health, something that had not been explored in New Brunswick within a research context. Constructivist grounded theory is informed and influenced by a relativist ontology and transactional epistemology. In other words, there are specific assumptions about the world around us, and we cannot separate ourselves from what we know. It is critical that researchers do not just follow a set of procedures, step-by-step, but that they consider the assumptions underlying constructivist grounded theory. Key to this is the assumption that researchers bring many aspects of their experiences and who they are to the research process (Corbin & Straus, 2015). This tenet of constructivist grounded theory was a critical element for me as the researcher in choosing a methodology. With almost two decades of experience as a classroom and special education resource teacher, in addition to my current role as the Director of

Education Support Services, it was not possible for me to ignore my previous experience in the field of education. This approach allowed me to be pragmatic about my experience and to be cognizant of any biases that presented themselves.

The constructive grounded theory approach used in this research project was informed by the work of Kathy Charmaz. Charmaz (2006, 2009) separated grounded theory into two paradigms: objectivist grounded theory and constructivist grounded theory. The original work of Strauss and Glaser (1967) was considered as fitting into the objectivist camp, while Charmaz and others (Higginbottom & Lauridsen, 2014) are situated within the constructivist camp. Objectivist grounded theorists assume a separate, unbiased, unobtrusive role as researchers in collecting and analyzing data. Constructivist grounded theorists place emphasis on the multiple perspectives of research participants as well as the researcher, the influence of social structure, and the reflective role of the researcher (Higginbottom & Lauridsen, 2014). While participants within this study were primarily school administrators or classroom teachers, they were also employees, colleagues, parents and community members.

In this approach, (i.e., constructivist) the use of the term "construct" is an intentional choice to emphasize that theory is constructed from the data as opposed to emerging from the data (Johnson, 2014). Charmaz (2014) developed an argument against the idea that only one reality exists and that the researcher is an objective observer with minimal to no impact on the data or data analysis. Instead of viewing the researcher as separate from the research, she suggests that the theories constructed are undoubtedly impacted by the researcher's social identity and background. While the researcher has a socially constructed reality that influences the research, so do the participants.

Charmaz's constructivist approach to grounded theory maintains that it is the researcher's responsibility to examine the methods by which participants construct their meaning and to further interpret their reality in the social structures and discourses of which they may be unaware (Charmaz, 2014; Corbin & Strauss, 2015). The constant comparative analysis that exists within this methodology can at times be exhausting and confusing, but is a necessary process to conceptualize the codes, categories, and finally the theory. At times during this process, I was overwhelmed with the amount of data collected as well as the all-consuming attention it required. The final theory generated using constructivist grounded theory is co-construction; the researcher is proposing a theory that reflects the experiences and interactions of the participants and the researcher. It moves past the idea of a "single basis process" and generates instead a theory that shows complexity of view and actions (Charmaz, 2013).

Positioning the literature review.

Those who advocate the purist approach to grounded theory will often cite Glaser's stance that the literature review should not take place until data analysis has taken place and is completed. This is problematic as it can be unclear as to *how* and *when* existing literature should be used (Dunne, 2011). Since the original work of Glaser and Strauss was made public, there have been concerns and questions as to how students and researchers should use the existing literature relevant to their research topic. Immersing oneself in existing literature prior to data collection is not only characteristic of most forms of inquiry, but it is expected. Glaser and Strauss, however, were against this and felt that a premature literature review could restrain the process of developing a grounded theory and could diminish the quality and originality of the research work (Dunne, 2011).

In recent years, the debate has settled as to not whether a literature review should be conducted, but when and how extensive it should be (Charmaz, 2014; Charmaz, 2013; Corbin & Strauss, 2015). It should be noted that Strauss came to advocate for an early literature review, and this was one of the reasons for his professional split with Glaser.

Pragmatically, postponing a literature review until data collection and analysis are underway is not feasible to many researchers and doctoral students (myself included), whose funding, ethical and process approval depend on a relevant research review prior to beginning data collection. According to Charmaz (2013), the final literature review should reflect the analytical categories. This stance resonated with me for several reasons. The important insight lies in how to make use of previous knowledge. She has taken the stance that the question becomes not whether previous knowledge should be used, but when and how. Glaser and Strauss (1967) both acknowledge that no researcher enters the field as a "blank slate". Engaging with the literature does provide an indication of the work already done within a given field and assists in providing a direction for the proposed research. While there was not a dearth of existing research in the area of the interrelated factors in healthy and inclusive schools, a pre-research literature review did allow me to see where gaps existed and to an extent helped generate semi-structured questions to guide the data collection. Finally, acknowledging that the pre-research literature review was not the final literature review allowed for me to be open to possibilities and to the data itself.

Following the stance of Charmaz and for the purposes of this research study, an initial literature review was completed that examined the existing research on inclusive education as well as comprehensive school health. As expected, once I undertook the

initial coding, early categorization of data, and constant analysis, it became increasingly clear that a more thorough literature review would be necessary as categories, themes and, eventually, theory were revealed.

Study Design

Applied research focuses on research problems that are common in a given field (McMillan & Schumaker, 2010). Its aim is to produce knowledge that is relevant to both theories and practice. Applied research in education can be characterized as linking research with action, to generate actionable knowledge (Flick, 2002). Applied research uses language that is common to a field and adds to the research-based knowledge in each field of study.

When carrying out applied research, context is essential to understanding the study and for extrapolating findings to future research and/or practices. Placing the setting in a context of educational organizations and processes allows the researchers and readers to take note of those aspects that appear to be unique and those that are similar to other contexts. Applying the interrelated frameworks of healthy and inclusive schools pragmatically in an applied research initiative in New Brunswick first requires a contextual understanding of the provincial education system. New Brunswick has a publicly-funded Kindergarten to grade 12 (K-12) education system, which offers a dual system of English and French schools. As of the 2017-2018 school year, there were 296 (206 Anglophone, 90 Francophone) schools and 97,755 (68,797 Anglophone, 28,985 Francophone) students, and approximately 7,520 (5244 Anglophone, 2276 Francophone) educators. There are four Anglophone school districts and three Francophone districts within the province. The current dropout rate is 1.2% (Department of Education and

Early Childhood Development, 2018). As discussed earlier, New Brunswick has had an inclusive education system since 1986. The mission for New Brunswick schools is to have: "each student develop the attributes needed to be a lifelong learner, to achieve personal fulfillment, and to contribute to a productive, just and democratic society" (Department of Education and Early Childhood Development, 2018).

All public schools (both Anglophone and Francophone) in New Brunswick operate under the same provincial policies. The challenge is that policy statements are often abstract and general. There is often no implementation guide and school districts and schools must determine how to implement and monitor policies within their own local context. While acclaimed nationally and internationally, Inclusive Education Policy 322 has given rise to questions from educators and the New Brunswick Teachers' Association concerning interpretation and implementation, particularly around when to vary the common learning environment and how to meet the needs of children and youth with challenging behaviour.

As stated earlier, the connecting factors between healthy and inclusive schools are not clearly delineated in the literature. The primary purpose of this applied research study was to identify factors that connect the successful implementation of two policy frameworks, that is, healthy schools and inclusive education. Review of the literature suggested that in both frameworks, particularly inclusive education, there existed a gap between research and practice. Of note, there was a lack of research being conducted with a focus on high schools in both inclusive education and comprehensive school health. While this is a challenge, it did offer an opportunity to conduct original research in this area. Other objectives included aiming to contribute to the knowledge of educators and

policy makers needed to strengthen healthy and inclusive schools while at the same time building a knowledge base to inform practical applications in the field.

This study examined schools with identified promising practices with the overarching goal to develop a theory as to what makes schools both healthy and inclusive. To be specific, when indicators reflect that schools are both healthy and inclusive, what are the contributing factors and processes? Are they separate or interrelated? The approach for the applied research was a case study design using constructivist grounded theory to help inform future policy and practice. High schools with identified promising practices in inclusive education and school health were examined to develop a theory of what makes those schools both healthy and inclusive. The resulting theory examined the impact of change and provincial government policy at the school level, and not only which factors and processes support inclusive education and school health, but how they are interrelated.

Methods

Participants.

Data from interviews, observations, and relevant policy documents were analyzed using the comparative analysis that is essential in grounded theory. It was important that schools selected to be studied were similar enough to ensure that data collected are theoretically relevant. Determination of schools selected was based on school improvement review data using established provincial indicators, student wellness survey data, and nomination by district superintendents or designates. I recognized that within the case study approach, voluntary participation could be a limitation; however, I considered participation mandated by district superintendents as a greater limitation that

could impact the openness and honesty of participants, given my current role at the ministry of education. This will be further elaborated upon in the discussion chapter.

Information provided to teaching staff about the existence and purpose of the study prior to the first interview varied among schools. Three of the school's administrators had provided detailed information along with the necessary summary of the research and consent forms ahead of time to review. Two of the schools' administrators provided minimal information to staff, and additional time was required to go over the necessary forms ahead of time. Given this, time was spent at the beginning of the interviews reviewing the purpose of the study and the consent forms.

Ethics approval by the University of New Brunswick Research Ethics Board was granted during the spring of 2017. Requests for participation were sent to each of the four Anglophone superintendents (Appendix A). The response from all four superintendents was positive with the agreement that they would initially approach the individual schools meeting the following criteria. Clear selection criteria of high schools were provided to school districts, including: (1) an administrator with three or more years of experience; (2) an administrator with knowledge of change leadership, as evidenced through completion of a graduate level program in educational administration and leadership; (3) high score on inclusive education and healthy school indicators; and (4) agreement to participate, be interviewed, and observed in a school setting. For inclusive education, a high scoring school were those schools that scored *mostly evident* and *very evident* on specific indicators. A description of the rating approach is provided below.

Suggested indicators for inclusive education and healthy schools included the provincially developed school improvement indicators and the New Brunswick Student

Wellness Survey data. The New Brunswick Department of Education and Early Childhood Development, in consultation with districts and schools, developed thirty-two indicators for school improvement. The indicators were divided according to systemic school planning, leadership and teaming, learning environment and classroom practice. This formative process of school improvement was seen as essential to assessing strengths and challenges and working toward developing an education system that is cohesive, effective and efficient (Department of Education and Early Childhood Development New Brunswick, 2013). Existing structures, practices and policies were examined to ensure they are effectively supporting the needs and strengths of our learners. The school improvement review process is currently overseen by school districts and indicators are rated in the following way: Very Evident (VE), Mostly Evident (ME), Somewhat Evident (SE) and Not Evident (NE). A team internal to the school completes the indicators and an external team from the school district does the same after examining school data, visiting and observing the school environment and conducting forums for parents, students and staff. Both teams compare data and once a consensus is reached, goals are chosen for the school to focus on in the coming years. The overarching goal for the school improvement review is to "ensure every school is an inclusive environment where the needs of the 21st century learners are met" (Department of Education and Early Childhood Development New Brunswick, 2013.

The purpose of the New Brunswick Student Wellness Survey (NBSWS) was to examine students' perceptions, attitudes, and behaviours in a number of key areas related to student well-being. It is a provincial initiative of the New Brunswick Department of Social Development - Wellness Branch in cooperation with the Department of Education

and Early Childhood Development. Data collection and analysis is carried out by the New Brunswick Health Council every three years. The survey is separated into the New Brunswick Elementary Student Wellness Survey that is administered to parents of students in Kindergarten to grade 5 and to grades 4 and 5 students. The New Brunswick Student Wellness Survey Grades Six to Twelve is conducted with students in those grades. The last survey for grades six to twelve took place during the 2015-2016 school year. Categories included learning, social and emotional development, participation and engagement, healthy lifestyle, safety, and health status. The 2018-2019 survey has taken place and results were released in November 2019.

I requested schools that were considered both healthy and inclusive for a couple of reasons. The first was that in order to proceed with future research to test my theory once this initial study was completed, it was important to establish "what works". Secondly, given my position at the Department of Education and Early Childhood Development, I considered that if I approached schools that were not performing well, they would not be open and transparent due to any perceived position of power. Working with schools that were identified as high performing allowed the stage to be set for developing rapport. Upon nomination by the school district, the principal of each school was approached by the district superintendent or their designate to see if they were open to participating. Once consent was given and schools were identified, the superintendent or their designate arranged for contact with each school. Upon receiving the go ahead from each superintendent, I reached out to the administrators (principal or vice-principal) as the point persons with whom to schedule a phone call to discuss my proposed research

study. All designated point persons participated in a phone call prior to consent forms being sent to discuss the proposed study and expectations.

My initial intent was to have four schools identified, each with four participants. One of the school districts identified two high schools that met the criteria and so both were suggested. While this increased the number of participants and subsequently the time needed to collect data, I wanted to ensure that in the event that some participants dropped out, I had sufficient data. Also, of note, one of the high schools identified was in the process of hiring a new principal. The current principal was in the process of accepting a secondment to another position. Upon reflection, I decided to keep the school in the study and interview both the leaving principal and an administrator currently within the school. All principals were initially contacted by email and a telephone conversation to explain the study. In addition to an administrator in each school, three educators were identified to participate. All five schools remained in the study for the duration. A total of 21 participants were interviewed during late fall, winter and early spring. Eighteen of the 21 participants were interviewed a second time for data validation and follow-up questions in late spring.

All five participating high schools were identified as high performing in areas of inclusion and comprehensive school health. In total, twenty-one participants participated in semi-structured interviews across five Anglophone high schools. All participants met the criteria for participation which included: (1) Schools that met or exceeded performance expectations on school improvement review data and the NB Wellness Survey data; (2) Schools that had an administrator with three or more years' experience; (3) an administrator with knowledge of change leadership; high performance on inclusive

education and healthy school indicators; and (4) agreement to be interviewed and observed in a school setting.

The identified schools were from various regions of the province and included both urban and rural schools. Table 1 provides a demographic breakdown of each school. To protect the identification of the participants and the schools, the data provided is presented in ranges of 10. Schools in New Brunswick are identified as small, medium or large depending on the enrollment data. A school with fewer than 250 students is considered a small school. Schools with enrollment between 250 and 750 students are medium sized and schools with greater than 751 students would be considered large high schools.

Table 1.

Demographic Breakdown of Participating Schools

School	School-Level Educators	School Size	Rural/Urban
1	>60	Large	Rural
2	>50	Large	Urban
3	>40	Medium	Urban
4	>30	Medium	Rural
5	>60	Large	Urban

Collection of data

The function of case study criteria and selection, in particular, school case studies, is to probe for factors and their interrelatedness in the school's implementation and maintenance of policy (Sautner, 2008). Data collection consisted of observations,

interviews, relevant policy documents, and the writing of a research journal that met the needs for self-reflection throughout the process.

Extant resources encompassed organizational documents, including relevant provincial education policies, commissioned government reports on inclusive education, literature, and district and school webpages. In using extant documents, two things resonated with me. The first was that it would be easy to undervalue the use of documents for theorizing. I found myself thinking similar thoughts at the beginning of my research. I saw the review of documents as a necessary factor but not one that would reveal much. However, it became clear that as I immersed myself in the documents mentioned above, they were in fact rich sources of data. Using Charmaz's (2014, p. 53-54), guiding questions for document study, I was able to consider the purpose and audiences of the documents; and how the documents reflected social, historical and organizational context. Even the use of language and organization of the documents revealed information. The second moment of clarity for me was that despite being "official" documents, they could not be considered completely as containing objective facts. They were created for specific purposes and reflected the social, economic, cultural and educational context of the time during which they were written.

Participants were either trained teachers and or/school administrators. As per grounded theory methodology, racial, gender, or demographic factors would only have been considered if they had emerged during data analysis, which in this study, they did not. I chose a semi-structured format for the interviews. This allowed for a specific set of questions, but also allowed me to clarify where needed and provided opportunities for the participants to add additional information that they considered to be relevant. In

preparation for the interviews with participants, I carried out a practice run with a colleague to ensure that the questions flowed and that the process would be fluid. Upon completion of the first round of interviews in a school, I wasn't completely sure that the interviews went deep enough or that the questioning was sufficiently fluid and moving beyond the semi-structured questions. After completing my field notes I went back for follow-up with each of the interviewees at the school to ask further questions and to probe deeper. This process was beneficial and better prepared me for the interviews at the second school. As a result, I was able to expand on the issues raised by the participants.

To capture the interviews, I used a digital recorder for each interview which was then transcribed later. I also took notes during the interview to capture ideas that caught my attention or that required follow-up. At the end of each interview, I completed my field notes and reflection journal to allow me to ruminate on the process and ideas.

While various proponents of grounded theory (Glaser, 1998) recommend not audio recording the interviews as it may draw the interviewees' attention away from their core concern, I chose to do so for a couple of reasons. As a novice in the field, I was initially concerned that without recording the event, I would miss capturing core concerns brought forward by the participants. Secondly, I knew that I would be using line by line coding during the initial coding stage and I wanted to be able to use transcriptions of the interviews.

In grounded theory, theoretical sampling refers to seeking relevant data "in order to develop an emerging theory" (Charmaz, 2014, p. 192). The main function of theoretical sampling is to refine the categories that make up the theory. Theoretical sampling continues until no new properties emerge. Also helpful at this point is what is

known as *member checking* or *member validation*. While this generally refers to taking ideas back to the participants for confirmation, the researcher can use this time to elaborate on the categories (Charmaz, 2014, p. 193-210). It is important to note that member checking is not the same as participants having the right to veto the categories. Upon completion of the first set of interviews (n=21), and after theoretical sampling and initial coding and my developing theoretical sensitivity, I returned to the participating schools for member checking and to validate the emerging theoretical concepts. This also allowed me to probe deeper into issues brought forward as well as to address and query why issues/themes I expected to occur during the interviews did not. Eighteen of the 21 participants were available to complete the member checking and second round of interviews.

Theoretical Sensitivity

Theoretical sensitivity as defined by Birks and Mills (2015, p. 58-59) is the ability to recognize and extract from the data elements that have relevance for the emerging theory. Theoretical sensitivity is guided by three important characteristics: (1) it reflects the sum of personal, professional and experiential history; (2) it can be enhanced by various tools, techniques and strategies and; (3) it increases as your research progresses. I found developing theoretical sensitivity to be one of the most exciting aspects of grounded theory and in term of this research study. Being able to see relevant data and abstract significant categories emerge is motivating. The challenge as Glasser (1992) discusses is to be aware of one's biases and not "forcing" the data into existing theoretical schemes.

As a professional in the field of inclusive education, I brought with me perceptions and ideas about what worked and what didn't in high schools. Examination of my reflection journals, field notes and memos all allowed me to be aware of and to understand my data through a theoretical filter. I used a number of mechanisms identified by Corbin and Strauss (2008) to promote theoretical sensitivity including the use of questioning, drawing upon personal experience, waving the red flag, looking at language, and asking, "so what' and "what if". Waving the red flag recognizes when biases, assumptions or beliefs are intruding into the analysis, and I would consider it to be one of the key elements of theoretical sensitivity. While I cannot ignore or separate myself from my biases, I can consciously try to identify them. This was an ongoing practice during this research study and one that required intentional focus and reflection. An example of this occurred during the data analysis and required follow-up questions during the member checking and validation interviews. With numerous years of experience as a special education resource teacher and my role in education support services and inclusion, I wrongly assumed that many of the participants would be in the role of education support teacher-resource (EST-R) or education support teacher – guidance (EST-G). In reality, only three of the 21 participants were currently in this role. When I questioned the participants during the validation stage, the majority being classroom teachers, as to why this might be, their responses were categorically the same, for example, "Why wouldn't it be me?", was a common response, or it was often, "At the end the day, I am responsible for the student". While the ESTs were seen as core and a central part of healthy and inclusive schools, it was the classroom teacher who saw

themselves ultimately responsible. Developing and reflecting on theoretical sensitivity allowed me to identify my biases and to then follow up for understanding.

Coding

In analyzing the data that has been collected, grounded theory requires coding of the data to further understand the concepts being studied. Coding refers to the process of "breaking down, examining, comparing, conceptualizing and categorizing data" (Strauss & Corbin, 1990, p. 61). It is the process of defining what "data are about" (Charmaz, 2013). The codes in grounded theory do not need to be quantified but enter into a qualitative and constant comparative analysis of the relationship to other codes and to context and action consequences (Kvale & Brinkman, 2009, p. 202). According to Charmaz (2014, 2013), data analyses begin with the first interview. The process of coding is a vital link between collecting data and the development of a theory.

Of important note during this stage of grounded theory analysis is the understanding that the resulting categories, concepts and theory are "grounded" in the data and that the researcher is open to the possibilities of what the data may reveal. Coding eventually moves from descriptive to more theoretical levels, leading to saturation when no new insights and interpretations emerge (multiples references). According to Charmaz (2014, 2013), the process of coding is a vital link between collecting data and the development of a theory.

It is generally accepted that there are three phases of coding: initial, intermediate and advanced, each with varying names, depending on the reference text. Using the reference text of Charmaz (2014), I chose to go with the complementary phases of initial, focused and theoretical coding.

Initial Coding.

Initial coding is the first step in grounded theory analysis and can be quite time consuming, as the purpose is to fracture the data (Glaser & Strauss, 1967) to compare incident with incident. Charmaz recommends using gerunds and coding the data with words that reflect action or process, or nouns to indicate condition or context (2014, p. 116). It is during the initial coding phase that I began to reflect and truly take ownership of the data. Initial coding can take several forms, including analyzing transcriptions or field notes, line by line coding or using short segments of data (Birks & Mills, 2015, p. 93). To ensure that I was not missing any relevant data collected, I analyzed both the transcriptions and field notes, line by line, resulting in 2394 lines of coded data. However, as I moved towards coding the follow-up interviews, I found that the process of line by line coding was unnecessary and somewhat limiting, as I had developed a sense of conceptual control over the data at the time. I was cautious during this time of not moving too fast towards an overview approach as cautioned by Birks and Mills (2015) to ensure that I was not missing anything. Initial coding can be both time consuming and overwhelming, and I found it to be both. It is also very much a reflexive process. It is during this phase that the researcher needs to constantly interrogate themselves about the early decisions that are being made. Initial coding can help identify areas in which more data is required or where gaps exist. It was during initial coding that I questioned what came next, for example, what was left unsaid, were there were more questions that I needed to ask, and where else should I go to get more data. Corbin and Strauss (2008) also advocate using a coding paradigm when thinking about how to analyze data. I found the three elements of the paradigm extremely useful when starting my data analyses.

They are: conditions (why, where, how, and what happens), interactions and emotions, and the consequences of the interactions and emotions. Decision making during constant comparative analysis relies on both inductive and abductive thought. Inductive thought refers to reasoning that begins with a study of individual cases and extrapolates patterns to form conceptual categories. Abduction refers to reasoning that begins by examining the data and entertains all plausible explanations for the observed data to arrive at the most plausible explanation (Birks & Mills, 2015, p. 90). Both forms of reasoning were active during my data analysis, the first during the initial coding to move towards conceptual categories, the second as part of the reasoning and validation of core categories and, finally, the emerging theory. Once the first round of interviews was completed it was evident that there were additional questions that arose, including what the data revealed and what it did not reveal. This will be elaborated in the discussion chapter.

A challenge in grounded theory, however, is to know when the point of saturation has been reached. There is saturation of data and there is also saturation of theoretical concepts (Charmaz, 2013; Charmaz, 2009). Saturation is related to the idea of comparison. When there are no new concepts or variations, and no new properties, it is acceptable to stop. At a different point in time, certain concepts may change; however, the researcher has to feel that it is sufficient for now.

Memoing.

During the coding and continuous comparison process, memos can be written to identify possible patterns in and between the codes. Memo writing has three purposes: firstly, the ideas expressed bring the data to a conceptual level; second, memo writing

facilitates the sorting and reworking of ideas; and third, the inventory of memos serves as a source of writing theory. Memoing is not restricted to the coding process. It can be about the links and the gaps between categories and the researcher's thoughts about the efficacy of categories (Engward, 2013). Memos are private and serve as ways to help develop the researcher's ideas. As Charmaz suggests, memos can be about events, cases, categories or relationships between categories (Charmaz, 2006; Engward, 2013). Memoing can be a way for the researcher to reflect on how prior experience and exposure to the extant literature can influence ideas (Dunne, 2011). Memoing is fundamental to grounded theory and is needed to facilitate the process of theory development. This was not a process that I was initially comfortable with and I experimented with various methods to memo my thoughts and ideas, including everything from writing the printed word, diagramming, and dictation of the spoken word into print. While all were beneficial, the process that worked best for me was using speech to text software. This for me facilitated a process that was fluid and resulted in a printed product to have for later use.

Focused Coding.

While the process of initial coding is time consuming, focused or intermediate coding is overwhelming for other reasons. Initial coding is the fracturing of data and intermediate coding is the process of putting it back together into conceptual categories by making connections between and within categories. Once initial coding has taken place, the codes require continuous organizing and grouping as the researcher starts to identify explanatory, conceptual patterns (Birks & Mills, 2015). Grounded theory categories are not one dimensional and may consist of several sub-categories to explain a

concept. A key task of focused coding is the connecting or integration of categories. It was here that for the first time, I saw the necessity of memoing as I compared categories and questioned the relationships between the concepts. My attempts at memoing were at first very splintered, but as I persevered, there was greater clarity in my thought processes.

Theoretical Coding.

The integration of data into a final theory is undoubtedly the most difficult part of grounded theory research, and this study was no exception. Whether perceived or real, there is pressure to have your grounded theory research culminate in a theory. One factor that will alleviate some of that pressure is that according to Bryant (2009, as cited in Birks and Mills, 2015, p. 109), original grounded theories do not need to be universally explanatory; rather they are contextually constrained awaiting further development. Birks and Mills (2015) assert that there are three factors needed for the integration of a grounded theory: (1) an identified core category; (2) theoretical saturation of major categories, meaning that there is no need for further collection of data and (3) an accumulated bank of analytical memos. Theoretical codes underlie the focused codes and show the relationships between them, rather than replace them (Charmaz, 2014, p. 150).

Ethical Considerations

Ethical dimensions and considerations are key for any qualitative research study. The core principles of respect for persons, concern for human welfare, and justice must be adhered to (van den Hoonard, 2015). Since the applied research involved human participants, ethical conduct had to meet the guidelines as set out by the University of

New Brunswick, the New Brunswick Department of Education and Early Childhood Development, and the Canadian Tri-Council Policy Statement.

While it was possible to assure districts and schools that confidentiality would be respected, anonymity could not be guaranteed. Schools are not to be identified by name; however, a profile of each school will be provided, and it may be possible within the education system to identify a school based on its profile. Additionally, any schools selected based on district nomination will be known to select district staff. In a province the size of New Brunswick, schools could be easily identified based on regional information and community context. For those reasons, limited demographic information is provided and where possible I did not include specific information from field notes and memos that might identify the schools.

Further ethical considerations in obtaining consent from participants included a letter to the superintendents of the four Anglophone school districts in New Brunswick. A summary of the research study (Appendix B) was provided to superintendents, and participants including the purpose of the study, benefits, methodology, data collection procedures, information pertaining to the right to opt out, stop the interview, or refuse to answer questions, as well as confidentiality and anonymity. At one time during the interviews, a participant asked to turn off the digital recorder. At another time, one participant chose not to answer a question that they were not comfortable answering. Since gender was not an identified factor in the data analysis, the gender-neutral terms of they/their/them were used instead of he/him/his or she/her/hers.

All interviews took place within schools or in the case of the principal on leave, at their place of work. All participants were identified by "participant" and an assigned

number. In my field notes, I did not use the names of school districts, schools or participants. All participant information, transcripts, audio files and notes are kept in a locked filing cabinet and will be destroyed within seven years of the completion of this research. Given the closeness of schools and professionals in this region, individuals may assume that it is their personal experience that is being reflected in the research. I trust that the level of conceptualization that emerged will ensure confidentiality.

Positioning the researcher within the study

Reflexivity as defined by Robson is "an awareness of the ways in which the researcher as an individual with a particular social identity and background has an impact on the research process" (2002, p. 22). It is important to identify the professional and personal background the researcher brings to the study. The research process acknowledges the identity and background of the researcher but cautions regarding imposing a specific theoretical framework as the lens through which data analysis should occur (Dunne, 2011). While personal identity and background can represent a potential area of bias, reflexivity itself does not negate the research. As Johnson (2014) points out, education researchers tend to bring backgrounds and histories of participation in school communities as students, teachers and sometimes parents. In other words, our status is such that we can never be fully outsiders in our research. We are instead actors and meaning makers ourselves in the process. For this researcher, it is important to state that the topic of the proposed research is personally meaningful due to a combination of personal and professional experiences. Acknowledgement of the above is one of the necessary factors to be able to meet the standards of good, scientific work.

As already stated, one of the key components of constructivism and the constructivist grounded theory approach is that there is recognition that the researcher brings many aspects of their experience to the process, including data collection and analysis. This is one of the reasons that I chose grounded theory, as I have lived in this world of inclusion and school health since 1993. My knowledge is constructed from a variety of professional perspectives: classroom teacher, special education teacher, learning specialist, Director of Education Support Services, and now researcher. I have taught in inclusive schools and in schools with segregated settings. Personal and professional experiences in developing and progressive fields in education, and exposure to different perspectives, have allowed for my positioning within a unique vantage point. Other considerations that came into play included the challenges of choosing an area of research that I was not familiar with while continuing to work full time during the completion of my doctoral studies. The other consideration was that I needed an area of research that I was passionate about and one that would sustain me over a number of years.

Given that I brought a lot of practical and professional experience, it was critical that I not allow my thoughts and biases to take over and drive the direction of the results. At times through the interviews, I struggled to stay with the questions and not jump in to provide commentary or to offer suggestions for challenges being discussed. The use of memos and my reflective journal helped resolve internal challenges that I was experiencing.

One of the challenges early on in the data collection phase was my current position as the director of Education Support Services for the Anglophone sector of the

New Brunswick Department of Education and Early Childhood Development. Participants were aware of my current role within the department. This was one of the reasons why I chose to look at high schools that performed well in both areas. I was concerned that attempting to work with high schools that were not high-performing in one or both areas would potentially impact rapport and openness from participants. While school districts and the Department of Education are seen as separate bodies, I was also concerned that schools would view me in an evaluative role, and both intentionally and unintentionally, not be completely forthcoming. During the interviews, I made sure to be cognizant of non-verbal cues from participants to sense if any were ill at ease with the line of questioning or concerns with my role at the Department of Education. This challenge occurred with two participants initially, and I reinforced that the purpose of the study was to learn from schools who were high performing. I also re-emphasised their confidentiality and their right to withdraw at any time. When I returned for the member checking and follow-up questions, there was a positive difference in our rapport.

My background, both personal and professional, influenced my theoretical lens and also was key to the development of theoretical sensitivity during this research study. Acknowledgement of the above is one of the necessary factors to be able to meet the standards of good, scientific work.

Interview Questions

The overall question for this research study was to identify the factors connecting healthy and inclusive high schools. In examining schools that were effective in implementing and sustaining both, it was important to explore how they were connected, to understand the ongoing work to ensure inclusive and healthy schools, and to give a

clear direction for realizing both. In exploring this question, it was necessary to select participants with first-hand experience of the topic. In this case, that included administrators and educators in high schools that were considered high performing in both comprehensive health and inclusive education.

I chose to construct semi-structured interview questions for participants (see Appendix F), adapted from the work of Sautner (2008) and her work with safe and caring schools. This allowed me to use open-ended, non-judgmental questions. Key questions included how participants defined both frameworks, what they saw as contributing factors and processes, what it looks like in practice, what supports were needed for effective implementation, and how they know that they are successful. I was also interested in their knowledge of relevant provincial policies and change leadership, particularly as they applied to both frameworks. I chose to ask the questions separately for each of the frameworks, as this allowed me to compare their answers to find the interconnecting factors and processes. Initially, during the interview process, I relied to a greater extent on the semi-structured questions. As I became more comfortable with the process, the interviews became more fluid and I was able to delve deeper into their responses. Further, the use of a constructivist grounded theory approach allowed me to explore in depth the meaning of the data to allow for informing policy and practice.

Summary

The intent of this chapter was to provide an overview of constructivist grounded theory and my reasons for choosing this methodology for this research study. This particular methodology allowed me to give voice to my participants, and recognized that as a researcher, I bring experiences and who I am to the research process. Through the use of memos, I was able to bridge gaps and form links between categories and my thoughts. This process is critical to grounded theory and without it, I do not believe it would be possible to progress beyond initial coding. The constant comparative analysis allowed for ongoing data analysis, and discovery of theory from the data being examined and analyzed.

In Chapter four, I present an overview of the process of theory integration and offer an account of the emergence of six core categories that are grounded in the data. I conclude with the process undertaken to arrive at the Foundational Relatedness Theory, that an intentional focus on fostering teachers' need for relatedness is the underpinning for healthy and inclusive schools.

Chapter IV: Results

"Of course, our focus is always the students, but a healthy school is when we all feel included, and we're working towards the same purpose."

(Participant, January 2018)

"So, there would have to be a feeling of your own self-worth or appreciated by, you know, colleagues and probably administration. Like people really get their sense of accomplishment when they're recognized from the top".

(Participant, December 2017)

"So, an inclusive school is one that has a safe learning and working environment for all where everybody feels good, they feel healthy, they feel positive, they want to be here. It's a place where people aren't just surviving, they're thriving. So that's an important key piece of it in a positive, healthy inclusive school. There has to be a thriving component to it, I think".

(Participant, December 2017)

Overview

As stated in previous chapters, the purpose of this research study was to identify the connecting factors in healthy and inclusive high schools by using a constructivist grounded theory approach to examine the frameworks. The purpose of this chapter is to elaborate on the data gathering and analysis that uncovered the factors that connect healthy and inclusive schools and to build a theory that is grounded in the data. Six core categories are identified and expanded upon. Findings are interpreted in relation to the

literature. The chapter concludes with the emergence of Foundational Relatedness Theory that posits relatedness as the underpinning for healthy and inclusive high schools in New Brunswick.

Data Gathering – Participants

While there was variability with participants in terms of teaching experience, degrees and current role, there were also similarities. Table 2.0 provides a summary of the participants including degrees obtained, current placement and the number of years teaching.

Table 2.

Summary of Academic and Teaching Experience of Participants

Participants with 2 or more degrees	21
Participants with a Master's Degree	13
Fewer than five years teaching experience	0
Between six-ten years teaching experience	2
Greater than ten years teaching experience	19
Current Role Full-time Administrator	4
Current Role Classroom teacher	15
Current Role Education Support Services Teacher	3

Four of the participants were in a current full-time administrator role, with a fifth participant on leave from an administrator role. Two participants held a 0.5 FTE administrator and a 0.5 FTE classroom teacher role. The majority of participants were classroom teachers, and three participants were currently in Education Support Teacher - Resource and Education Support Teacher - Guidance roles. All participants had a minimum of two university degrees, and some had three degrees. The majority of participants held a Master's degree in Education, and two participants had less than ten years' teaching experience. While there were differences among the five schools and

participants in physical environment, scheduling and pedagogical approaches, all five were consistent in a number of interrelated factors and practices.

Data Gathering – Interviews

As discussed in the previous chapter, each interview was audio-recorded with permission and transcribed. Notes were taken to capture key elements of responses and to identify components of responses that required follow-up, either with the participants or in the literature. Semi-structured interview questions guided the process initially. Once the participants and I were more comfortable and the process was more fluid, there was less dependence on the structured format. Participants were provided with the option to revisit the questions and their comments at any time during the interviews. Each participant was offered the opportunity to email or call with additional information once the interviewed ended if something came to mind, although no one did. Even though the questions were open-ended, it was challenging to encourage some participants to expand on their responses. As my comfort level increased, I was able to draw this out more with follow-up questions and by not rushing to fill the silence. The process was much more fluid during the follow-up interviews.

In addition to the interview questions, data were collected from observation opportunities in each school and review of relevant policy and strategic documents. Each school allowed time for me to walk through the school on my own to observe staff and students in common areas, including learning commons, cafeterias and atriums.

Data Analysis – Initial Coding

There are numerous graphical representations of grounded theory data analysis (Birks & Mills, 2015; Charmaz, 2014). Figure 1.0 is adapted from Charmaz (2014). While maintaining the same levels of analysis reflected below, I chose a graphical representation that would show the fluidity of the approach.

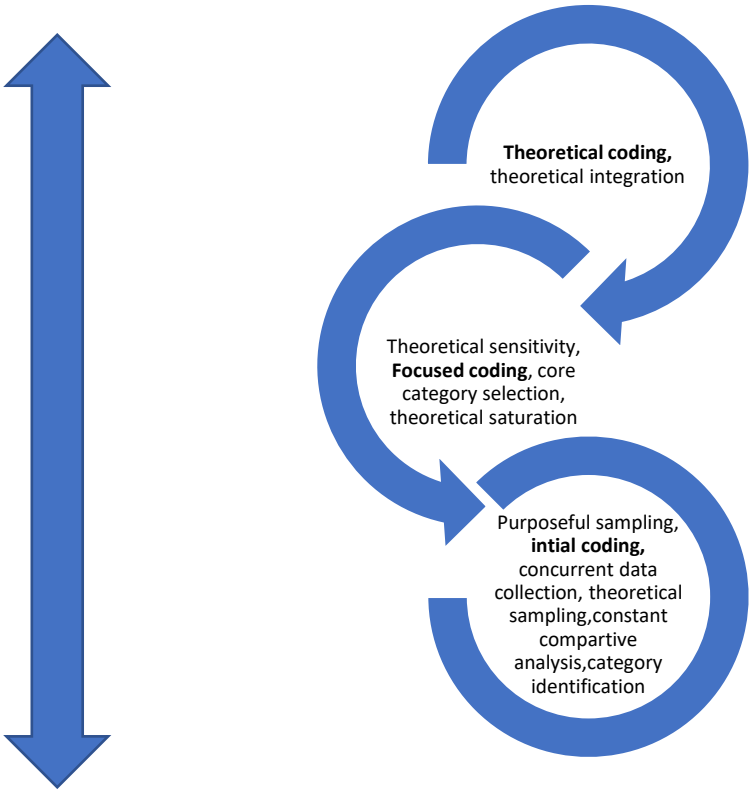

Figure 1.

Graphical representation of grounded theory analysis (Adapted from Charmaz, 2014).

As I began my data analysis, I continued to review the literature to provide coherence to my understanding of the connecting factors among schools. One of the strengths of grounded theory is that it allows for constant comparative analysis while data are being gathered. Field notes and memos were written in tandem with the interviews

and their transcription. The evidence provided by the data and the literature provided support in the interpretation of findings.

The coding process in this research study involved three phases: initial, focused and theoretical coding. Using the responses generated by participant interviews and using the semi-structured interview questions in Appendix F as a guide to begin line by line coding, it was evident that there were common factors in implementing both frameworks. Questions about defining, implementing and process pertaining to healthy and inclusive schools were asked separately to determine if there were differences. Table 3 provides examples of responses that were common to both frameworks. It also includes sample responses of how participants conceptualized change leadership and policy implementation.

Table 3.

Samples of Responses to Interview Questions

Focus	Sample of Responses
Healthy and Inclusive Schools	• Safe and welcoming for all students and staff, no matter socio-economic, academic background, happy, health students and staff • Prioritizes learning for all, flexible learning environments, strengths and weaknesses recognized • Everyone feels included and working towards a common purpose • Sense of connection and belonging • Culture that is welcoming, structured and fair • Basic needs are met: food, clothing, physical and emotional health • Cultivate relationships • Health and well-being come first

Focus	Sample of Responses
Contributing factors and processes in healthy and inclusive high schools	• Strong support teams, i.e., core leadership, administrative, education support services (ESS) • Learning is secondary to relationships • Processes for educator, student, family input, invest in up-front time to build relationships • Flexible learning environments • Not one size fits all, success is not the same for everyone • Community involvement • School is extension of community • Responsive not reactive • Resiliency
Practices to effectively support healthy and inclusive high schools	• Personalized learning not at-risk but underserved • Not grouped by ability, differentiation, flexible grouping, universal design for learning • Teaching within zone of proximal development • Strength-based approaches for students and staff • Triangulation of data to track and inform: products, observations and conversations • Success can look different for different students • Resources: human resources, high interest-low vocabulary material • Risk-supported environments for students and staff • Celebration of successes
Indicators of success in healthy and inclusive schools	• Graduation rates • Drop-out rates • Observations • Perception surveys • Partnerships • Students and staff know they are valued • Triangulation of data (products, observations, conversations) • Staff attendance and wellness

Focus	Sample of Responses
Understanding of change leadership	• Clear vision • Slow moving beast • Need buy in • Be the buzz • Voice • What and Why • Not just teachers, include educational assistants, custodians, administrative assistants • Connect individually and by groups • Hard to change • Balancing act • Communication • Opportunities for leadership
Recommendations for future policy development and implementation	• Adapt for individual school context • Resources to support implementation • Practical applications • Teacher consultation • Communication • Support needed • We are professionals – trust us

Initial coding for the purposes of this study was carried out by analyzing transcriptions and field notes line by line. As each line of code was read, a word, segment or phrase was recorded in the form of an action word or gerund to capture what was being said, while not being purely descriptive. This resulted in 2394 lines of initial coding being identified. Through constant comparative analysis, these codes were reduced to 117. The process of initial coding was a reflexive activity and guided my next steps. It was a chance to reflect deeply and begin to make sense of the content of the data. During initial coding, the goal was to remain open to all possible theoretical directions (Charmaz, 2014, p. 114). This time required an intentional focus and awareness of my influences and biases, both as a teacher and as a civil servant.

Language was critical during this step as I actively named the codes based on what I saw as significant in the data and, at the same time, ensured that I was giving voice to the participants. There was a great deal of time spent "sitting" with the data during this process, asking, "What do the data suggest?", "Whose point of view?", "What is missing here, and where are the gaps?", "Are there specific contexts at play?", and "What theoretical category does this indicate?".

Initial coding continued until categories began to form. As I began to gain more control conceptually over the data and what it conveyed, line by line coding became unneeded. However, in order not to rush the process or to move too quickly, I continued line by line analysis for all the transcribed interviews and field notes. Additionally, there were times during the journey from initial coding to theoretical coding that I found myself going back and forth and overlapping the various types of analysis. Initially, I considered this to be related to my being a novice researcher. However, I found reassurance in Charmaz's Constructing Grounded Theory (2014) that this was an expected part of the comparative analysis that is foundational to grounded theory.

Upon completion of initial coding, a completed set of coded data remained. While there were no new data to examine here at this time, it was not the end in coding. The next step was to explore the relationships among the categories, and to make connections using both inductive and abductive reasoning. Moving to this next stage involved strategies (what are they doing to achieve and influence) and context (where and when and with whom), intervening conditions, actions/reactions and consequences (Birks & Mills, 2015; Charmaz, 2014). Through constant comparative analysis of the numerous codes determined during initial coding, connections were found and categories were

further collapsed into 117 categories. While still overwhelming, this was a much more comfortable and manageable data set from which to work. From there, I began to create a visual representation to display the interrelationships (see Figure 1.).

Figure 2.

Initial Coding: Collapsing line by line codes.

Data Analysis - Focused Coding

Focused coding allowed for "putting the data back together". Connections between and within categories were explored while at the same time acknowledging relationships and patterns. This was a continuous process, one that required purposeful organization. Categories were grouped, regrouped and regrouped again leading to the naming of core categories.

In total, six interconnected factors or core categories were identified with each category presented and interpreted based upon various levels of analysis. The six core categories were: overarching assumptions; universal relatedness practices; systems,

structures and policies for relatedness; systems, structures and policies for competency; systems, structures and policies for autonomy support; and understanding successful change. These six core categories were further explored and validated with participants and within the literature to provide an integrated approach to a grounded theory.

One of the challenges with focused coding is to refine categories and at the same time elevate the level of analysis. It was important to elevate the coding beyond descriptive codes to ones that encapsulated what the data were showing. As with the initial coding, I had to consider if there were outliers that did not fit the core categories, whether there were questions that still needed to be asked, and whether the core categories could be collapsed even further. There was a noticeable difference in my memoing and journaling during this time. They became more focused on pulling the data together conceptually and contextually, and on my struggles with where to place categories graphically. The memo written on April 3, 2018 on relatedness and zone of proximal development provides a sense of the internal struggle I was experiencing,

> *Looking at the guiding principles of social constructivism, in order for educators to learn, it would have to be through human activity and then creating meaning through their interactions with others or things. And while relatedness is definitely involved in achieving zone of proximal development, so is competence, and some could argue autonomy. (Memo, April 2018).*

As core categories were identified, I found myself at times moving too quickly toward the final theoretical coding and had to constantly remind myself to let the data "speak" to me and to not rush the process.

As the categories were being refined, theoretical sampling continued all the way through the research study. It was here that I returned to the schools and the participants to member-check the core categories and to have them expand on them within the context of their own school. I explained that the categories were not exhaustive in terms of each school, but that they were common across all five schools. All eighteen participants validated the findings and indicated that the six categories resonated with them and they were able to expand on them in depth within the context of their schools and community.

While the categories were being refined, I found myself consciously focused on theoretical sensitivity and my role as researcher positioned within the study. While this was a factor during the interview process and initial coding, it was more evident during focused coding. I found myself reading and re-reading my journals and memos to ensure I was not, as Glaser (1992) said, "forcing the data". It also allowed me during member-checking to ask follow-up questions where I may have been experiencing bias and had a preconceived response.

Saturation

During the research process, I kept wondering when I would experience saturation, when no new insights and interpretations would emerge. I knew, as Charmaz (2014, 2013) said, that saturation would be a vital link between collecting the data and the development of my theory. I knew it would not be a specific number of interviews or categories; however, it was not until I completed the second set of interviews and their coding that saturation was achieved. Those interviews were transcribed and coded along with field notes. That information was considered within the previously identified core

categories. It was at this point that I felt that I had enough data and that no new information would be forthcoming.

Conceptualization of Categories

Focused coding uses the most frequent and significant codes and involves making decisions about which of the initial codes make the most analytical sense to categorize the data (Charmaz, 2014). These codes are more conceptual than initial coding. Through constant comparative analysis, there were also concepts and ideas that emerged that helped illuminate and focus my memoing and continued analysis. The first illumination was that there were universal assumptions that crossed all schools and participants, including flexible learning environments and school-wide supports. The second was connectedness and relationships. During each of the interviews and through each phase of coding, connectedness and relationships were central to the data. The establishment and maintaining of relationships were woven unequivocally into almost every answer given by participants. When asked how to define both healthy and inclusive schools, the answers were similar across frameworks, schools and participants. Participants described healthy and inclusive schools as those that were safe and welcoming for both students and staff, where learning was prioritized for all. They talked about students and staff feeling a sense of connectedness in an authentic way and a sense of belonging. Categories also started to emerge in areas related to students' and teachers' zone of proximal development, and autonomy support. Additionally, all of these concepts required an understanding of supportive change. These were concepts that I explored further when I met with the participants for the follow-up questions and validation of data.

Many of the data themes that emerged were allocated to more than one category. The following is a sample list of the more than 117 codes that emerged:

- Responsive
- Universal
- Connecting
- Relatedness
- Zone of proximal development
- Voice
- Professional development
- Instructional practice
- Coaching
- Positive Learning Environment
- Strength-based
- Community
- Moral imperative culture
- Reflective
- Genuine
- Resiliency
- Restorative
- Value
- Diversity
- Welcoming

- Transparency
- Flexible Learning Environments
- Effective Transitioning
- Criteria for success

Many of these codes were collapsed into more conceptual codes, while others became properties of my core categories. It was important that the categories be analytic and not merely descriptive. For example, *relationships* were emerging as a core category, while *voice, connectedness* and *strength-based* became properties of the category. *Trust, clear vision, authentic* and t*ransparency* were indicators of the change leadership category: change leadership was later coded as *successful change*.

As I interacted with the data, I experienced a lot of self-questioning, wondering if all the data would fit into each of the core categories. There were data that remained outliers that I had to consider. After consultations with my supervisors and re-reading Kathy Charmaz's *Constructing Grounded Theory* (2014) text, it became clear that it was not necessary to capture everything in this dissertation. I will be able to use the rich data for subsequent research.

Study Findings

In this section, key findings are presented and examined in detail, including the consolidation of six core categories and the emergence of the grounded theory. The expansion of the core categories discussed provide the groundwork and foundation for the theory of relatedness as the underpinning for healthy and inclusive high schools in New Brunswick.

As discussed earlier, six core categories emerged during the data collection phases of focused and theoretical coding. During this phase, it emerged that there were connections between systems, structures and policies and to the basic human psychological needs of relatedness, competency and autonomy as defined by Edward Deci and Richard Ryan (2002, p.68) as part of their Self-Determination Theory. When those needs were fulfilled, individuals are able to become self-determined and are motivated to grow and change. Self-Determination Theory provided a launching pad and became more relevant as data analysis was undertaken and codes and categories were being constructed. The connection to Self-Determination Theory (SDT), which grew out of the work of Deci and Ryan is elaborated on in the following section on emerging theory and more specifically in chapter five, as part of a micro-literature review.

The six core categories identified were: overarching assumptions; universal relatedness practices; systems structures and policies for relatedness; systems, structures and policies for competency; systems, structures, and policies for autonomy; and understanding successful change. For the purposes of this chapter and to avoid repetition, policy as it relates to the need for relatedness, competence and autonomy is captured in a separate section as data were common across all three areas. The following section expands on the core categories, both in the data and in the literature. Figures 3a to 3f reflect my thought processes and provide a visual representation of organizing initial codes into each of the core categories.

Overarching Assumptions.

In analyzing the data, there were overarching assumptions that were similar across all five participating schools about the learning environment in healthy and inclusive

schools. An initial reason for separating questions for healthy and inclusive schools was to see whether participants would view both frameworks as separate and whether they would approach them differently or view them as the same or similar. I also wanted to see if they would speak to inclusive education with a disability-focused lens or view it in broader terms. Responses indicated that the majority of participants blended healthy and inclusionary practices, "*Healthy school are inclusive schools,"*[1] "*Inclusion is not always disability focused,"* [2] *"Inclusion is where everybody is learning, whatever their starting point, so they are moving forward."*[3] Healthy and inclusive schools were seen as all-encompassing, where a sense of connectedness was a priority, "*Without relationships, you have the illusion of support, "*[4] *"…the priority is connecting with the kid, curriculum comes second."*[5]

In every school the participants spoke about the importance of meeting the basic needs of all students. There was recognition that many students for various reasons experience food insecurity and depend on schools to provide breakfast programs and hot lunches. Without this basic need being met, students would not be able to learn optimally. Within each school and amongst participants, there was discussion about the role that community schools play in helping ensure basic needs are met and that there is a moral imperative to meet the learners where they are and to prepare them for adulthood. School leaders with a moral imperative strive to make a difference in the lives of students and they act with intention (Fullan, 2002).

[1] Field interview, December, 2017
[2] Field interview, January, 2018
[3] Field interview, December 2017
[4] Field interview, December 2017
[5] Field interview, January, 2018

One of the most important implications of constructivist learning theory is that learning is an active and evolving process, not static (Garrison, 1993). Participants spoke of the need to have a strength-based approach and to be responsive to all students: *"people try to create a cookie cutter approach, you are dealing with individuals and you cannot do that,"*[6] *"... need to see the whole child and the demands on the students."*[7] The ongoing relationship between students and educators results in meaningful and valued knowledge structures (Garrison, 1993).

Each school was very focused on ways to embed school-wide interventions and supports, including PBIS, RTI and Positive Mental Health (PMS): *"Tier 2 and 3 supports will never work without the foundation of tier 1*."[8] Principals had autonomy to create healthy and inclusive environments and to assign staff to support them. There were flexible learning environments within all schools and there was either a learning-commons or a common area for all students. Learning was not only taking place within typical classrooms, but space was being utilized in many ways, including courtyards, cafeterias, atriums, gymnasiums, learning commons, on-line, etc.

As stated in chapter two, the term common learning environment was introduced with the 2009 definition of inclusive education. The intent of the term was to account for learning that occurs outside a traditional classroom as indicated above, but also outside the 'bricks and mortar" notion of school buildings (I. Boehler, personal communication, November, 15, 2018). Learning environments included on-line courses, virtual environments and co-teaching. Other methods included flexible grouping and using high

[6] Field interview, April, 2018
[7] Field interview, January, 2018
[8] Field interview, February, 2018

impact instructional practices, including scaffolding, reciprocal teaching, prior knowledge and collective teacher efficacy (Hattie & Zierer, 2019).

Learning was also occurring in the community, as one participant observed, *"schools are the extension of the community"*[9], and I heard often from participants that relationships went beyond the classroom.

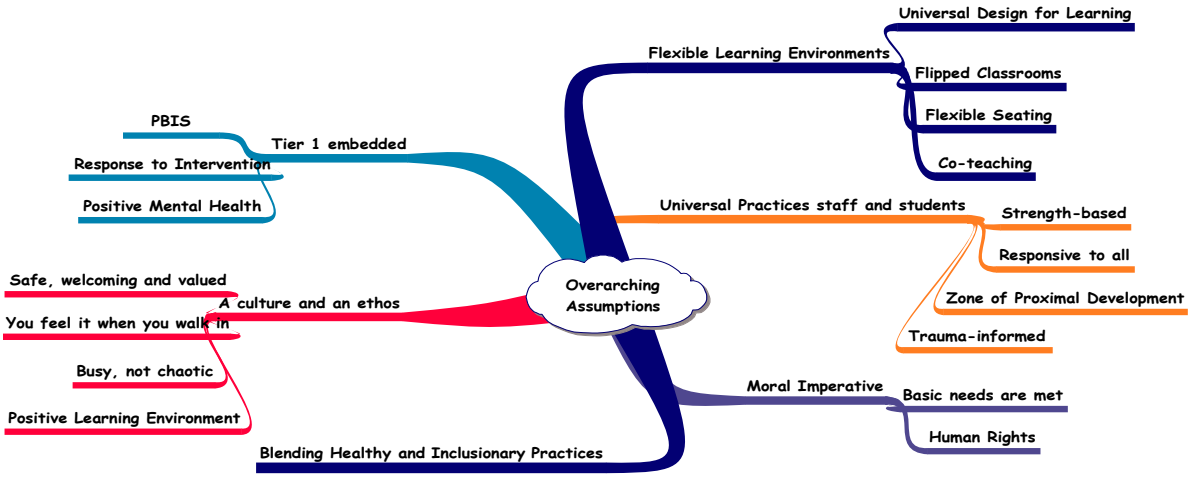

Figure 3a.

Core category of overarching assumptions.

Universal Relatedness Practices.

Relatedness is about feeling socially connected with others and feeling a sense of belonging with others (Ryan & Deci, 2017; Ryan & Deci, 2002). People feel a sense of relatedness when they feel cared for and about by others. Equally important is seeing oneself as giving and contributing to others (Ryan & Deci, 2017, p. 11). When teachers

[9] Field interview, December, 2017

feel that they are part of a community of professionals, it helps to create optimal learning environments (Krasnoff, 2015).

Deci and Ryan (2017) posit that when people feel a sense of connectedness to others, they will evidence greater well-being (p. 297). Participants in this study defined healthy and inclusive schools as safe and welcoming where everyone is valued and is learning, "*All are welcomed, no matter their background, socio-economic status, academic strengths and weaknesses*."[10] Within every school, at least one participant indicated that it was possible to know a school was healthy and inclusive as soon as you walked in. Ensuring a safe and welcoming learning environment for all students and staff is not without its challenges. This is supported by research carried out by Swain-Bradway, Freemna, Kittleman, and Nese (2018), where results indicated that high schools are more likely to struggle to implement school-wide, tier 1 PBIS (Positive Behavioural Intervention and Supports).

Participants spoke about the importance of being visible to all students, not just those they taught. From greeting students in the morning, to being present in the hallways between classes, opportunities to make a connection and build a relationship were seized upon. As supported by Peter Dewitt (2015), being visible is not enough; educators need to authentically engage and connect with students. There is no substitute for face to face interactions, that allow for their presence to be viewed as supportive and positive (Oliver, 2007). While two-thirds of participants reported that their administrators (principals and vice-principals) were also visible along with them in the school environment,

[10] Field interview, January, 2018

approximately one-third reported that this was a gap in their schools and was something that they would have liked to see more.

As further analysis occurred, and relationships and a sense of connectedness were emerging as a possible theoretical code, there was an awareness that each school in their own context had struggled with specific tragedies. Without giving information that could identify participating schools, these included staff and student deaths, and the impact of natural disasters (flooding, ice, etc.). Follow-up questions asked participants to talk about resiliency and what it looked like in times of change or challenge. Participants talked about the importance of intentionally teaching and modelling resiliency in their schools. Similar to other questions, staff quickly shifted to the adults in their buildings and communities.

As with each of the six core categories, participants focused on their actions being intentional and purposeful, "*you have to be aware of what you are doing*."[11] Participants saw the foundation already there in their schools to make it work, but also acknowledged that it is hard and worthwhile work, "*It's a good place to be, I get teary-eyed*."[12]

[11] Field interview, February, 2018
[12] Field interview, February 2018

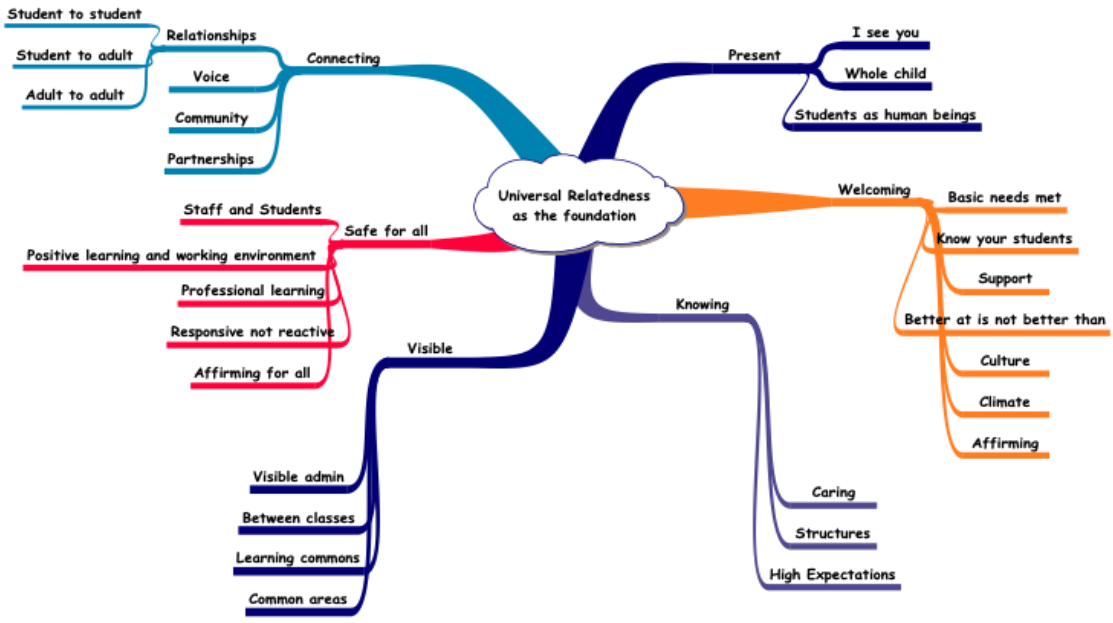

Figure 3b.

Core category of universal relatedness practices.

Systems and Structures for Relatedness.

Over the years, education systems have decided on, implemented, and expected common structures, sometimes without considering varied community needs. This research study suggests that as an education system, processes that would lead to and allow for varied structures are necessary for healthy and inclusive schools. There is a need to make these processes explicit, intentional and purposeful.

Each of the five schools have structures in place to support the building of relationships. In acknowledging the need for relatedness and a sense of connectedness for students and adults, that need extended to community and to partnerships. Partnerships to support the schools were seen as a key element in building and maintaining relationships. School-community partnerships can strengthen and support programming capacity and

resources (Thomas, Rowe, & Harris, 2010). Whether rural or urban, schools found ways to connect with partners in the local and global communities. Partners included advocacy groups such as Ability NB (formally paraNB), the New Brunswick Association of Community Living (NBACL), Best Buddies, Atlantic Wellness, John Howard Society, Pro Sports, and Sobeys.

Within each school, participants described various partnerships with local communities, including having students complete learning opportunities and experiences in their community, for example, Coop Education placements, experiential learning, and volunteerism. Others had community members come into the school to share, mentor and support school-based programming and activities. All agreed that while collaborative partnerships were happening, there was still much that could be done to build those relationships.

Over the years, there has been a focus on the utility of advisory periods or classes in high schools. Each of the five high schools in this research study had some form of an advisory period, although it was not always referred to as such. It took various forms, including every day to every few weeks, with the same teachers and with various teachers, but all with the same goal of building or improving relationships and providing a constant for students.

In follow-up interviews and in recognition of a previous bias, I expected that there would be discussion on the challenges of student behaviour in each of the five schools and in particular, severe disruptive behaviour. However, this was not the case and when I followed up with participants, a variety of responses were given: “our *suspension rates*

are down over five years due to processes and strategies in place,"[13] *"students have bought in to the vision and expectations, this is how you behave in the community,"*[14] *"a lot of time is spent transitioning, knowing ahead of time, planning proactively."* [15] There were, however, two participants who felt that the structure of high schools is such that by the time students get to grades 11 and 12, if there are behavioural concerns, students become less engaged in school and don't attend. More often than not, the answer was that it was not an issue of major concern. The culture and environment of the school was such that student needs were being met, "*The way we build that connectedness and trust, it is easier to deal with behaviour in the classroom first", "…without structure we become reactive."* [16] When instances of challenging behaviour occurred, the processes that existed within the schools (including referrals to Education Support Services teams, response to intervention (RTI) processes and PBIS processes) took over and proactive actions occurred. One participant described that at the time of the first interview, they had not seen any instances of severe disruptive behaviour within the school. However, by the time of the follow-up interview, an incident occurred that allowed them to see the effectiveness of the team and the wrap-around approach put into place to support the student, family and staff. Of note was that some participants separated behaviour into two categories: behaviour that is associated with a developmental disability, such as autism spectrum disorder, and behaviour that they saw as associated with mental health and

[13] Field interview, March, 2018
[14] Field interview, March 2018
[15] Field interview, April, 2018
[16] Field interview, April 2018

wellness, "*Behaviour is not a huge concern. The mental health side is huge, but not behaviour."*[17]

Provincially, there has been much work carried out in implementing an Integrated Service Delivery (ISD) approach to supporting students and families with mental health needs. The ISD model is a child and youth centered framework to provide wrap-around programs and services for children and youth and their families at school, home and in the community (Government of New Brunswick, 2019). With ISD and Child and Youth teams active in all school districts and health regions, I suspected that participants would see it as key to addressing student needs. However, this was not the case. When the ISD model was brought up, it was in the context of being *"a support*" and not "*the support*". Participants saw the benefit, particularly in schools where it was working well; however, it was referred to in the context of being one of many supports and resources in place.

While this research study identified the importance of building a sense of relatedness with students, it also identified the key element of relatedness for staff in the schools. Each of the five schools had processes and structures in place to support the learning and wellness of all staff. Professional Learning Communities (PLCs) provided opportunities to interact with others across grade and subject areas. Participants reported being encouraged to take risks and felt supported by their administration. The majority of participants reported teaching in content areas based on their pre-service training and their passions. When circumstances outside the school environment impacted staff, processes were in place to help support their resiliency along with their basic needs: *"teachers don't have it figured out, no one is immune to tragedies in life, there are*

[17] Field interview, June 2018

opportunities for all of us to grow." [18] Staff wellness was identified by all principals as a priority with large and small group activities planned on an ongoing basis. The one area where participants felt there was a lack of clarity was in whether non-teaching staff (e.g., educational assistants, school intervention workers, and custodians) felt supported and were comfortable attending such events.

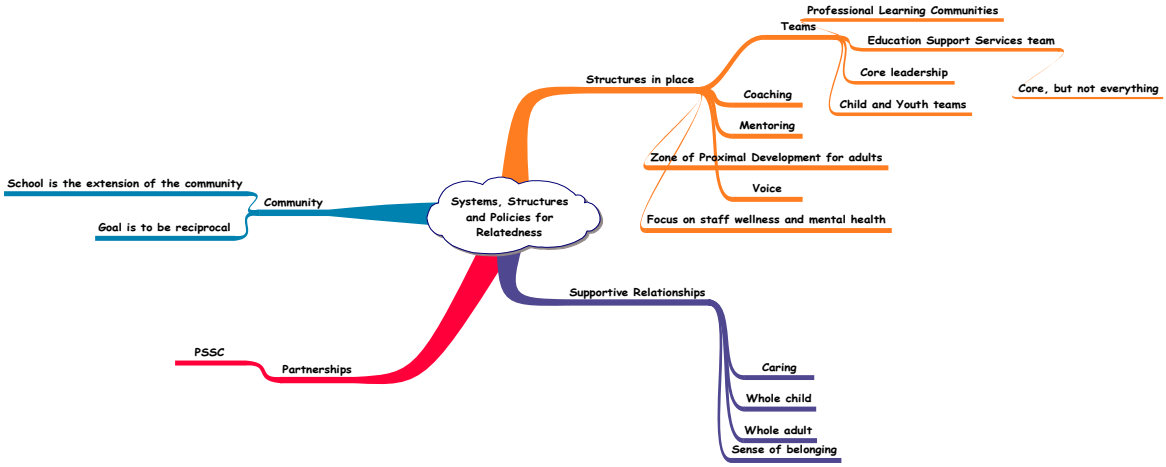

Figure 3c.

Core category of relatedness.

Systems and Structures for Competency.

Within Deci and Ryan's Self-Determination Theory, the need for competence refers to a sense of proficiency and feelings of effectiveness in one's work (Ryan & Deci, 2002). People feel competent when they have had the opportunity to engage in challenging tasks that allow them to use and build on their existing skills and knowledge. Principals can support this need in educators by providing opportunities for appropriate

[18] Field interview, April 2018

professional learning, providing support, providing leadership opportunities, offering regular feedback and, where possible, removing barriers to efficient performance (Gilbert & Kelloway, 2014, p. 183).

Participants in this research study reported the importance of personalized learning for all students. As one participant noted: "*It is about who is in front of you, not just multiple intelligences, what is it they need to be classroom ready?"*[19] While human resource supports were provided to support students with academic and/or behaviour difficulties, some participants identified the lack of material resources as an issue. For example, access to high-interest, low vocabulary texts for struggling readers was identified as well as delays in receiving assistive technology: *"…it is not just FTE, all the teachers won't help if the right teachers and structures are not in place."*[20]

In describing personalized learning, participants spoke about various ways of looking at success. While high expectations for all students were emphasized, so was the suggestion that success can mean different things for different students. For some, it meant obtaining credits towards graduation, and for others the focus was on relationships and providing a safe and welcoming learning environment. The key is that every student's learning needs are being met.

I expected that participants would focus on the zone of proximal development (ZPD) for students, (Vygotsky, 1978), but I was not prepared for the extent to which they emphasized the ZPD for educators. The seminal work of Lev Vygotsky has become the foundation of cognitive development research and theory (McLeod, 2018). Flores, Hernandez, Garcia and Claeys (2011) suggest that teachers' zone of proximal

[19] Field interview, February 2018
[20] Field interview, February, 2018

development encompasses concurrent academic, personal, and professional development needs. Participating in communities of practice allows educators to be reflective and to access peers who can become competent partners in their ZPD. Participants identified the importance of professional learning communities within their schools; however, finding dedicated times to meet presented an obstacle at times.

Recognizing that educators learn and perform within various zones of development is important for supporting their professional growth. A professional learning model of "one size fits all" will not allow for competence to be developed. Participants identified the importance of school-wide and at times district and province-wide professional learning to ensure consistent messaging but wanted embedded professional learning specific to their needs and school context. They spoke about the importance of continuous learning and coaching: *"You have an obligation to grow and not be stagnant,"*[21] *"We forget we are a professional and an employee, we have an ethical responsibility."*[22]

Structures and processes in place to support competency included relying on the support of the school-based Education Support Services team (ESST). The referral process was one that most participants were familiar with and relied upon. With several policies impacting inclusive and healthy frameworks, I wanted to understand the extent to which schools and their staffs were aware of relevant policies and the impact on their day to day work.

[21] Field interview, April 2018
[22] Field interview, April 2018

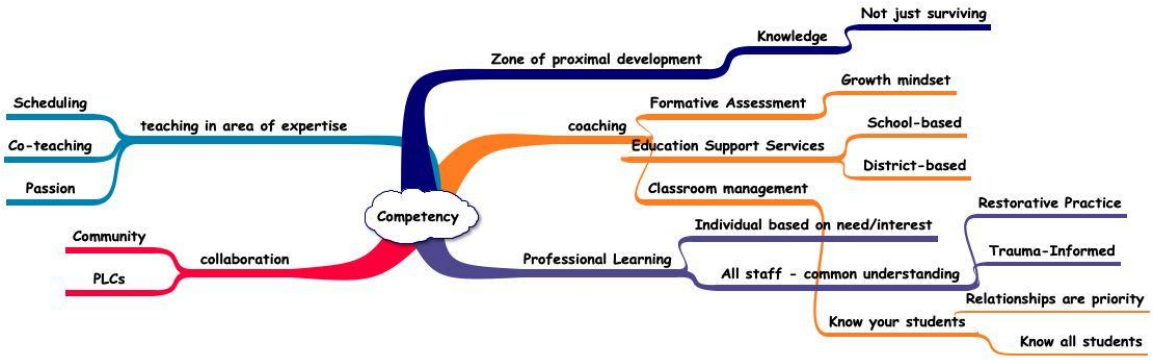

Figure 3d.

Core category of competency.

Systems and Structures for Autonomy Support.

Ryan and Deci (2017) define autonomy as the need to self-regulate experiences and actions. This is not to be construed as independence (p. 10), although allowing administrators and teachers autonomy to make some decisions was certainly an area that was revealed in the data. Autonomy as it pertains to Self-Determination Theory refers to engaging in behaviour that is compatible with one's values (Gilbert and Kelloway, 2014, p. 183). The need for autonomy can be supported by sharing influence and control, allowing for the possibility of failure, providing feedback and trying to understand the perspectives of employees.

It was clear from all participants that having a voice in decision-making was key to their sense of autonomy and to the culture of the school: *"We don't want a culture of complaint but one where we problem-solve it,"*[23] *"We need to power through situations, not around them."*[24]Administrators made efforts to offer various avenues to provide input into decisions, where possible. Overall, participants recognized that providing input did

[23] Field interview, April 2018

[24] Field interview, April 2018

not mean that their opinion or input was the final say, but they trusted that it would be valued and taken into consideration. Avenues included large group staff meetings, one-one-one conversations, surveys, an open-door policy or a combination of such practices.

Leadership support via core leadership teams, professional learning communities and education support services teams were all identified; however, strong leadership in an administrator was seen as critical. The move from a more traditional hierarchical model of leadership to one that is distributive and interactive is key to transformative teacher leadership (Anderson, 2008). As part of having voice, participants identified wanting the support of leadership to take risks, try new things, and take on leadership opportunities. Several participants reported wanting opportunities to be offered to all staff and not just a select few: *"some want the opportunity but are not comfortable reaching out."*[25]

[25] Field interview, December 2017

Figure 3e.

Core category of autonomy support.

Understanding Supportive Change.

The education system in New Brunswick has undergone many changes over the years, and with each change, the impact is felt at the classroom level. Changes to strategic plans, policies, amalgamation of school districts and political influence have all been experienced. Most recently, the New Brunswick Auditor General released a report condemning the number of education plans that have disrupted the system in the last 15 years and created instability (Government of New Brunswick, 2019).

As both frameworks are cornerstones to the education system, I wanted to hear from the participants about was needed to lead change within their school. The number one criterion identified to support change was a clear vision. Each participant spoke

about the necessity of having the administration have a clear vision that is communicated to staff and to the community. Codes that emerged from the data included clear guidance, support, reason for the change, research-based, professionalism and dignity. They wanted very much to be part of the decision making and to know that their input was valued and respected: *"Places grow from disagreement, it is healthy and respectful, we don't run from it. You can have different viewpoints and people who challenge, it is how we get better."* [26] There was an expectation that any collaboration and consultation be genuine and that there would not be an *"illusion of inclusion"*. Transparency and trust were critical to the process of change, and if trust was broken or damaged, it was not easily repaired: *"Trust us, we are professionals."*[27]

Staff were clear that they wanted data to be used to measure and track changes when implementing change, and to refine targets when needed. Change takes time and staff felt at times it was rushed and not a continuous process. As one participant indicated: *"change is a slow-moving beast,"*[28] Another reported: "It *is not so much as a process, but an ongoing conversation."*[29] Staff development, engagement and resources to support change were also identified as being needed. Not everyone is in the same stage of development and supports need to address individual and group needs. Effective change leadership within a school can lead to a more positive learning and working environment (Pepper & Thomas, 2002).

[26] Field interview, February 2018
[27] Field interview, February 2018
[28] Field interview, December 2017
[29] Field interview, February 2018

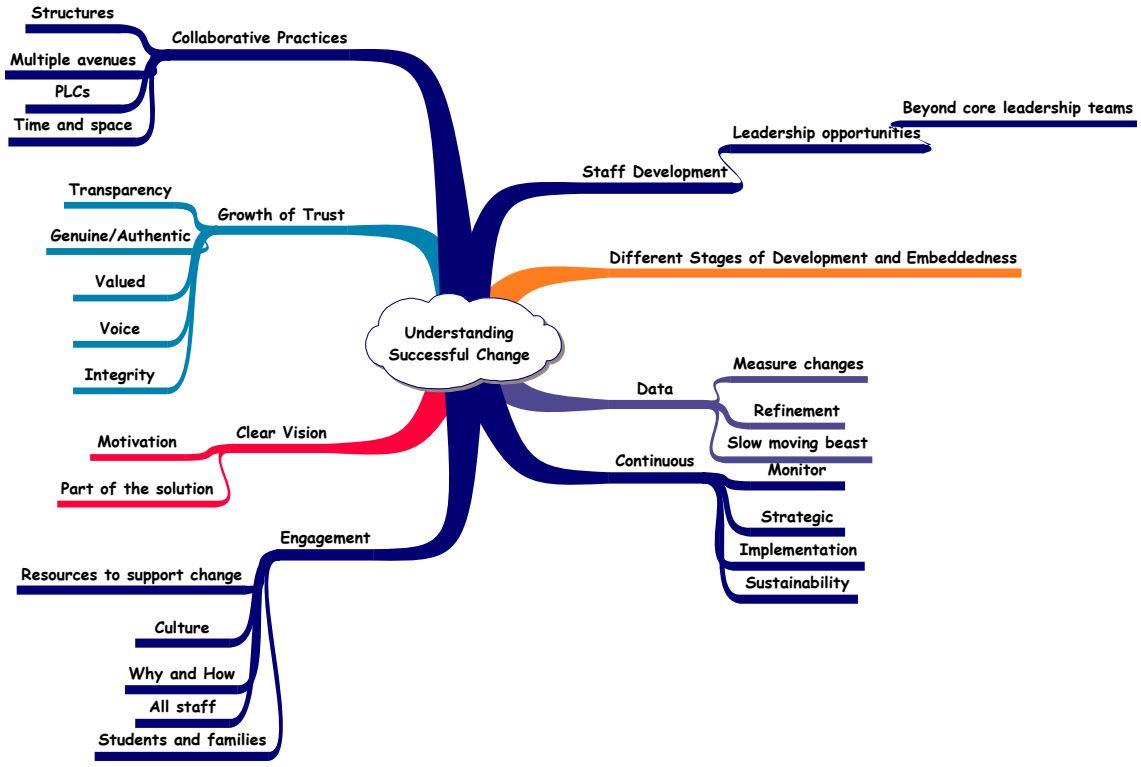

Figure 3f.

Core category of successful change.

Policy.

With several policies impacting inclusive and healthy frameworks, I wanted to understand the extent to which schools and their staffs were aware of relevant policies and the impact on their day to day work. Findings pertaining to policy implementation are supported by the work of Edgerton, Polikoff and Desimore (2017), who identified five key elements, including specificity, authority, consistency, power and stability.

Findings from this research study revealed that overall participants were more familiar with district-based policies than with provincial policies developed by the Department of Education and Early Childhood Development. The provincial policies identified were often referred to by number and not by name, i.e. Policy 701, 703, 711,

322, etc. Although not the majority, there were some participants who felt that they were very familiar with policies, including 322, Inclusive Education: "*I follow 322 to the letter."* [30] Others felt that it was the most confusing and open to interpretation of all the provincial policies. While not an official policy, participants were more familiar with the ten-year education plan, *Everyone at their best.* There was a sense of a "wait and see" approach from participants as to whether they thought the plan would continue. There was concern expressed by a number of participants that with a focus on a ten-year plan and a provincial government based on a four-year election cycle, subsequent governments may choose to create a new plan.

The majority of participants spoke about knowing very few details of the policies and that they had little impact in the day-to- day functioning of their classrooms, and on classroom instruction: "*I don't know the policy, not in detail. I don't know the specifics."* [31] Concerns with the above policies centered on a perceived lack of consultation and involvement of educators, and lack of resources and time to implement and support them. As one participant expressed: "…*we have to make it fit our school and we need time to do that."* [32] Suggestions for future policy development and implementation included greater consultation with educators, clear reasoning and research-based evidence to support the need for policy, a clear plan for communicating the policy to educators, parents, students and community, and possible piloting before rolling out provincially.

At the same time, while participants were not overly aware of policy details, there was a mention of a need to provide guidelines to support the polices and to hold

[30] Field interview, February 2018
[31] Field interview, April 2018
[32] Field interview, January 2018

educators accountable to them. As one participant said: *"They all have the same end goal, don't they? It's all about the kids, therefore, they are our kids."*[33].

Emergence of Grounded Theory

A challenge with grounded theory analysis is not to see each stage of coding beginning after the previous one ends. As illustrated in Figure 1.0, it is not a linear process and I found myself moving back and forth between codes on a regular basis, questioning the data to see if there were still gaps, considering whether categories would be further collapsed, and exploring my own self-validation. I read numerous grounded theory studies during this time to digest all I could about coding and conceptualization of categories. My memos during this time fluctuated between those that articulated my move from focused into theoretical coding and those that were reflective of the struggle I was having to put into words a theoretical concept that captured my research in its entirety.

> *I am struggling with whether or not zone of proximal development for teachers is a key or core category. It can be linked to competence and autonomy. What about relatedness? While I initially thought the data would focus on students, it actually focused on staff and staff behaviour. The six core categories contribute to the implementation of both frameworks, but how do I go deeper? Is it relationships or zone of proximal development? Maybe there are two key theories and not one. One is about students (building relationships) and the second is about adults (ZPD). Is it about the relationships? Is it a sense of belonging instead for staff and students? (Memo, January 2019)*

[33] Field interview, April 2018

It was during this ambiguous period that time was spent sorting and separating memos and constantly re-grounding the data. This was not a linear process but one that allowed for relationships to be seen between the core categories so that I was able to move forward towards defining the focus of my developing theory.

Moving forward with theoretical integration continually brought my attention back to what was happening in each of the five participating schools and how they were focused on supporting the needs of the adults in their schools, as shown in the following memo.

> *Early on in the data collection phase, it became clear that each of the high schools have focused intentionally on the well-being of adults in their building, particularly teachers. I assumed going in, and I recognize that this is was a bias, that there would be a lot of focus on the students in the building… and there was. But somehow there is a shift in the data where the focus is on adults in terms of competence, wellness, voice and decision-making. While this has been surprising and exciting for me, I wonder if I am forgetting the original purpose. The intent was to look at the underlying processes that were at play in these high-performing high schools. Yes, the focus is on adults and their zone of proximal development is a key finding but what does that mean? I need to take a step back and listen to what the data is telling me and not try and force it into a preconceived notion. And maybe if a core category is competence then that could include competency for students as well as the adults. Maybe it is the focus on adults and their wellness that allows them to do the same for students and that is the key finding (Memo, August 2018).*

I continued to analyze the core categories and consider what connected them. I considered various theories of motivation and how they would apply to the workplace, in this context the school environment, including: Herzberg's Motivation-Hygiene Theory, Argyris's Theory, Deci and Ryan's Self-Determination Theory and Maslow's Hierarchy of Needs Theory. Two motivation theories resonated with me, that of Maslow's Hierarchy of Needs and Deci and Ryan's Self-Determination Theory. While there was

appeal in Maslow's Hierarchy of Needs theory indicating that humans are driven by needs that are ranked hierarchically, I did not feel that this was what the data were revealing across the core categories. The second, that of Self-Determination Theory, made more theoretical sense in the given data set. This theory, originally developed by Deci and Ryan, has been expanded on by many researchers in many countries since (Ryan & Deci, 2017). Self-Determination Theory includes intrinsic and extrinsic motivation, noting that people have an innate need for competence, autonomy and relatedness (or connectedness). When those needs are met, people will grow and function optimally. The social environment, or in this study, the school environment must nurture those needs.

As the data were being analyzed, it was possible to see that the need for competence, autonomy and relatedness was emerging through some of the core categories. Table 4.0 provides a summary of the coding to arrive at the theory that is grounded in the data.

Table 4.0

Summary of Coding

	Coding		
Interview transcripts	**Initial coding**	**Focused Coding**	**Theoretical Coding**
"It is about personalized learning, who is in front of you. It's not just multiple intelligences, but how do they communicate, what do they need to be classroom ready", "We need to get them ready for life after high school", "	Positive learning environment, human rights, safe and welcoming, strength-based, responsive to all, basic needs are met, promotion of health habits	Universal practices, moral imperative, flexible learning environments, embedded, culture, school-wide	Overarching Assumptions
"It's all about the relationships", "When you know your students you presume positive intent", "It's a good place to be, I get teary-eyed", "Teachers are more willing when supported", "students know when they are valued", "All students and community feel welcomed, and there are connections with community"	Relationships, voice, community, sense of belonging, responsive, affirming for all, caring, high expectations, basic needs met, responding to need	Present, knowing, visible, safe for all, connecting, welcoming	Universal Relatedness Practices
"Teachers need Education Support Teachers and paraprofessional support, we need to be able to reach out when there is a gap in knowledge"	Extension of community, coaching, mentoring, ZPD, Voice, sense of belonging, whole adult	Structures in place, supportive relationships, partnerships, community	Systems, Structures and Policies for Relatedness
"There are ways to build in time for PLCs", "Not so much a process, but an ongoing conversation",	Co-teaching, passion, community, formative assessment, all staff, PLCs	Professional learning, areas of expertise, collaboration, coaching, ZPD	Systems, Structures and Policies for Competency

"Trust me as a professional", "It's not just about FTE, all the teachers won't help if it is not the right teachers and the right structures in place", "Key to change is to support each other, give schools the autonomy for policy implementation"	Triangulation of data, core leadership, educated professionals, formative assessment, meet them where they are	Data tracking, leadership support, professionalism, policy guidance and support, ZPD	Systems, Structures and Policies for Autonomy Support
"We don't need a culture of complaint, but here is how we will problem-solve it", "As with teenagers, teachers have cliques, it is a struggle", "Change is a slow-moving beast", "Disagreements are ok, places grow from disagreements"	Culture, All Staff, Resources to support change, motivation, valued, transparency, authentic	Engagement, Clear Vision, Growth of Trust, Collaborative Practices	Successful Change

Theoretical integration, however, still felt incomplete. I continued to explore the work of Deci and Ryan, and SDT and to use that lens to go deeper. While Deci and Ryan presented the self-determination model as lateral, I felt that, in this case, there was something deeper. The data allowed for an extension and elaboration of Deci and Ryan's psychological needs of competence, autonomy and relatedness.

It was during this time that I was introduced to the work of Paul Ricoeur, a 20th century philosopher who combined phenomenological description with hermeneutics. Through his seminal work, *Oneself as Another*, Ricoeur's view holds that the individual does not exist in a vacuous space as a sole and separate being. Instead, Ricoeur suggests that the self always stands in relationship with another in a shared world (Peirovich, 2011).

As theoretical integration progressed, I continued to be brought back to each of the five participating schools. In particular, I was drawn back to their intentional and purposeful focus in supporting adults and their need for relatedness which lead me to the emergent theory.

Integration was becoming solidified at this stage. I saw the relatedness as the foundational piece of my theory. In order for the other categories to be actualized, the need for connectedness must be nurtured and realized. In other words, the theory generated that is grounded in the data is that, *an intentional focus on fostering teachers' need for relatedness is the underpinning for competence and autonomy, contributing to healthy and inclusive high schools*. For ease of reference and for future use, I have named this theory the Foundational Relatedness Theory. Figure 4.0 provides a graphic representation of the grounded theory, that shows relatedness as the foundational underpinning for healthy and inclusive high schools.

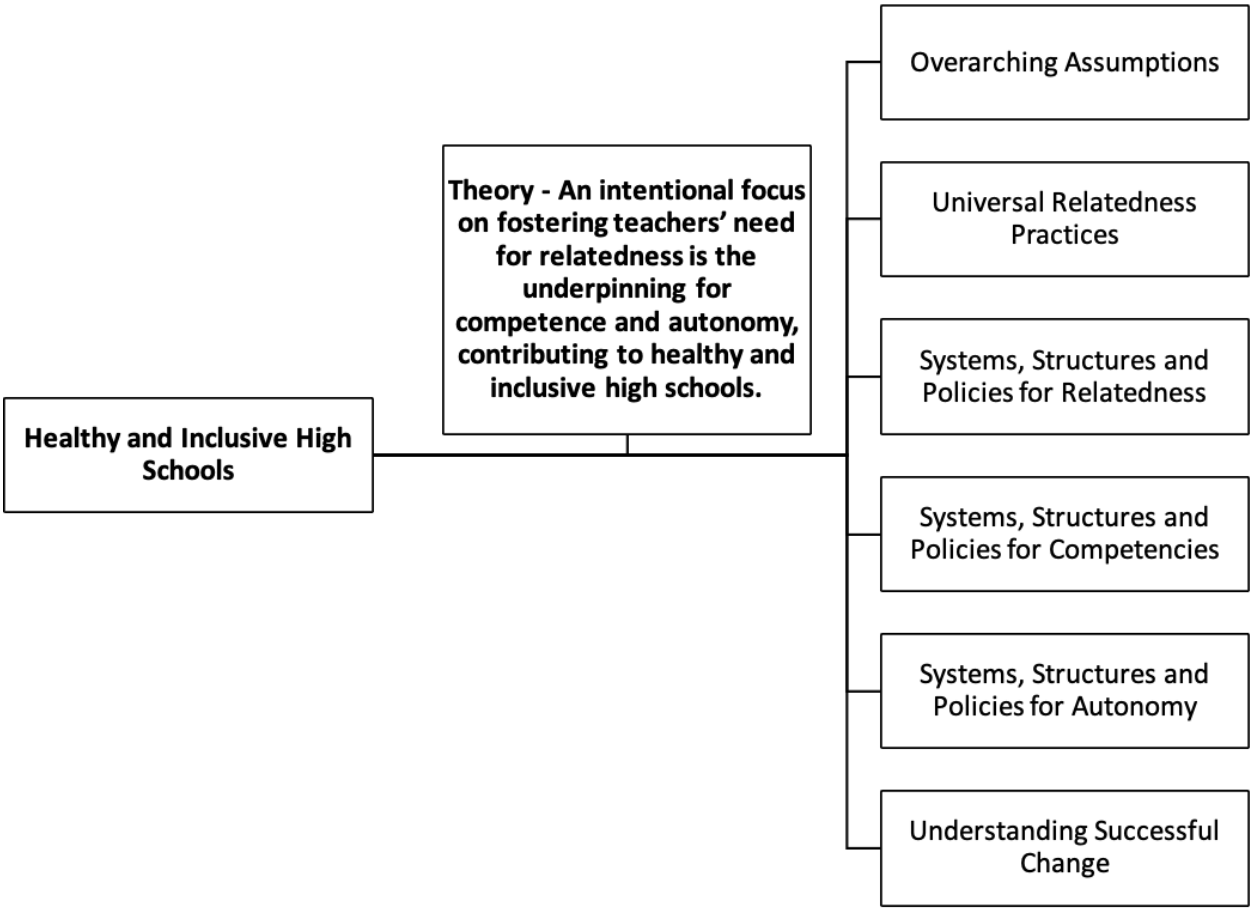

Figure 4.

Foundational Relatedness Theory: Relatedness as the underpinning for healthy and inclusive high schools in New Brunswick.

Summary

In this chapter, I elaborated on the data gathering that took place during this study. The intent of this chapter was to provide an analysis of the data, elaborating on the factors that connect healthy and inclusive high schools and to generate a theory that is grounded in the data. The core categories that emerged from the data were: overarching assumptions; universal relatedness practices; systems structures and policies for relatedness; systems, structures and policies for competency; systems, structures, and policies for autonomy; and understanding successful change.

As theory integration was solidified, a grounded theory emerged, that of Foundational Relatedness Theory. I believe that an intentional and purposeful focus on fostering teachers' need for relatedness is the foundation for competence and autonomy, contributing to healthy and inclusive high schools. The frameworks are not mutually exclusive, not only are they bound together by the need for relatedness, it is the foundational underpinning to realizing both.

The next chapter presents a discussion of the results of the study within existent literature, its trustworthiness and limitations, as well as implications for educators, policy and future research.

CHAPTER V: DISCUSSION

This chapter provides a discussion of the significance of the research findings and insights for future research. A micro literature review on Deci and Ryan's Self-Determination Theory is presented to set the stage for this chapter. This chapter concludes with recommendations for policy and practice, and a brief summary and conclusion.

Micro-Literature Review - Self-Determination Theory

As detailed in chapter three, positioning a literature review before data collection and analysis was complete was not pragmatic for this research study. As core categories and theory revealed themselves it was necessary to delve into the literature of Self-Determination Theory. A micro-literature review on SDT is presented in this section.

Self-Determination Theory (SDT) is a macro theory of human motivation and wellness. Originated by Edward Deci and Richard Ryan, it was developed on the principle that individuals are innately driven to grow psychologically while at the same time integrating experiences to develop a sense of self (Ryan, Connell, & Deci, 1985, as cited in Shepherd-Jones & Salisbury-Glennon, 2018). Self-Determination Theory is reflected in research and applied practice as being concerned with the social conditions that either facilitate or hinder human wellness and flourishing (Ryan & Deci, 2017). As stated in Ryan and Deci (2017):

> Self-determination theory research critically inquires into factors, both intrinsic to individual development and within social contexts, that facilitate vitality, motivation, social integration and well-being, and, alternatively, those that

> contribute to depletion, fragmentation, antisocial behaviours and unhappiness (Ryan & Deci, 2017, p. 3).

The premise is that individuals become more self-determined when their needs for relatedness, competence and autonomy are met. The foundation of Self-Determination Theory is that social conditions can either support or impede one's development, depending on whether their psychological needs are being met (Ryan & Deci, 2017; Power & Goodnough, 2019). Deci and Ryan's conceptualization of social contexts is important not only to the immediate situations but to development and wellness over time (Ryan & Deci, 2017).

There are two key assumptions to Self-Determination Theory: the first being autonomous and controlled motivation, and the second of psychological needs. In particular, Deci and Ryan considered not the amount of motivation, but types of motivation and in doing so, explored autonomous versus controlled motivation. If an individual performs a behaviour because it is enjoyable, interesting and valued, they are autonomously motivated. Controlled motivation is when an individual does something to get a reward, they feel pressured, it is demanded of them or they feel obliged (Deci, 2017). When one is autonomously motivated, their engagement, wellness and performance are greater than when they experience controlled motivation.

Deci and Ryan (2000) distinguish between types of motivation based on reason or goals. The most basic distinction is between intrinsic and extrinsic motivation. In the simplest of terms, they define intrinsic motivation as "doing something because it is inherently interesting or enjoyable." Extrinsic motivation is defined as, "doing something because it leads to a separate outcome." Self-Determination Theory is framed both in

terms of social and environmental factors that facilitate, instead of undermining, intrinsic motivation. It assumes that intrinsic motivation is catalyzed rather than caused, when there are conditions that meet an individual's needs (Deci & Ryan, 2000).

Since extrinsically motivated factors are not inherently interesting and must be externally prompted, at least initially, a primary reason people are willing to perform the behaviour is because it is valued by those to whom they feel connected or a sense of relatedness (Deci & Ryan, 2000).

Psychological Needs.

The other fundamental element to Self-Determination Theory is that all humans have a set of basic psychological needs that must be satisfied for optimal wellness and performance. Self-Determination Theory's three basic psychological needs that are essential for growth, integrity and well-being, are those for autonomy, competence and relatedness (Ryan & Deci, 2017, p 3-7).

Autonomy is choosing to engage in behaviour that is compatible with one's values out of personal interest or an expression of the self (Ryan & Deci, 2002). It is congruent with feeling in control of one's behaviour and goals. Competence refers to an individual's need for a sense of proficiency and feelings of effectiveness in one's work (Deci & Ryan, 2002), to feel confident and effective in what they do. Relatedness is the feeling of connectedness with others, the feeling of being cared for and that you matter to others, and the feeling of belonging to a group or with other individuals (Ryan & Deci, 2000). The impact of relatedness is reciprocal; it is not just how others treat you, but how you treat others, and how you matter in their lives. It is part of what makes us feel connected as human beings. One of the tenets of Self-Determination Theory is that the

needs of autonomy, competence and relatedness are connected intricately; the fulfillment of each need is interwoven with the fulfillment of the others (Ryan & Deci, 2017).

Oneself as Self.

At the core of Self-Determination Theory is a very specific view of self (Ryan & Deci, 2017. Self, in this sense, is not synonymous with person. Deci and Ryan (1990) view self as going deeper than cognition. "… the self does not reflect social forces; rather it represents the intrinsic growth processes whose tendency is toward integration of one's own experiences and action with one's sense of relatedness to the selves of others" (p. 8). As stated by Wasserman Dean Marcelo Suarez-Orozo at the Organization for Economic Co-operation and Development's (OECD) Policy Forum on Strength Through Diversity, '*all learning is relational"* (2018). From Bowlby's experiments with Harlow monkeys to the more recent work on sense of belonging, there is a psychological need to be connected to and accepted by others, while acknowledging that not every instance of social interaction supports that need for relatedness. As Deci and Ryan affirm (2017), there is no full functioning without relationships

The French philosopher Paul Ricoeur hypothesizes that the self can only be defined in relationship with others since we share a common world from the time that we take our first breath. And that we can only growth through our relationships with others (Pierovich, 2011). Ricoeur theorizes that there are three integral aspects to identity: reflection upon our being-in-the-world, recognition of our temporal nature, and realization of our fundamental relationship with the other. Ricoeur states that "the self, stripped bare…should make it clear to us that the issue here is the ethical primacy of the other than the self over the self" (Ricoeur 1992, p. 168). Thus, Ricoeur's concept of

identity is highly relational; in fact, we cannot define the self without consideration of the other. We must see the self as another (Ricoeur, 1992, p. 93). For Ricoeur, "we must live our lives with an awareness of our unique place in the world, and, at the same time, recognize ourselves in the other" (p.223).

Self-determination Theory in the workplace.

Initially developed by Deci and Ryan, Self-Determination Theory has been expanded and refined over the last 40 years (Gagne & Deci, 2005), including into the workplace environment. Deci and Ryan (2000, 2014) voiced that the psychological health and well-being of employees is critical to the workplace outcome of productivity, when it comes to long-term organizational health. Though the psychological needs of autonomy, competence and relatedness are universal, the ways in which they are met vary, depending on individual personality and environment. Conditions that are nurturing and supportive of employee wellness include those that promote productivity, commitment, and creativity (Deci & Ryan, 2014), and provide the basis for employees to become more self-determined.

While many factors contribute to job stress and stress reactions can take different forms, Self-Determination Theory can be an overarching framework for understanding job stress (Fernet & Austin, 2014). The workplace domain can be impacted by high and low demands and by management style (autonomy supportive versus controlling). This can play a role in how employees adapt to their work environment and the stress actions that may result, including a diminished wellbeing.

Leaders who work to fulfill the wellness needs of employees can help facilitate an environment in which they can perform optimally. A leader who supports employee

wellness and the satisfaction of their basic needs is more likely to produce positive outcomes, whereas those that prevent or impede are more likely to produce negative outcomes (Board, Deci & Ryan, 2004, as cited in Gilbert & Kelloway, 2014).

Schools as a workplace domain.

In the context of the current research study, a school environment can be seen as a successful social condition in accommodating participants' need to feel related, competent and autonomous. With students and educators spending their formative and professional (respectively) lives in educational contexts, it is easy to see why schools are so critical to development and wellness. While school is an environment where students spend much of their time, it is also the workplace for educators and non-teaching staff. As a result, adults in schools will have spent a significant amount of their lives, as a student and as an employee, in the school domain. In the current literature, a gap exists in the self-determination approach specific to educator motivation and psychological needs, although linkages can be made.

Much of the SDT in schools research is focused on how educators can support students and the importance of being intentional and focused on their needs. As stated in Ryan and Deci, "…it is essential for educational climates to be attentive to the satisfaction of students' basic psychological needs, including supports for their diverse interests and capabilities." (2017, p. 351). I would agree with Ryan and Deci's statement and would suggest that the same premise applies to educators. Educators within schools are dually-influenced by SDT in that they have a key role in supporting students' psychological needs being met while at the same time, as employees, they also have their own individual self-determination needs. If there is impairment to their own needs being

met, it affects the extent to which they can help support student needs. This is critical in all education systems but I would posit even more so, in a healthy and inclusive school.

In the 2018 work of Shepherd-Jones and Salisbury-Glennon, exploring teacher motivation and principal leadership styles, it was reported that the nurturance of teachers' psychological needs is susceptible to the working environment created by a school leader. A positive relationship between school administrators and teachers can garner a positive learning environment; teachers report leaving or moving within the profession due to administrative support, limited influence and autonomy (Ingersoll, 2001; Kersaint, Lewis, Potter & Meisels, 2005). The work of Niemiec and Ryan (2009) provided support for teachers' autonomy. They reported that if the autonomy of teachers is undermined they are more reliant on extrinsic strategies when teaching and they bring less enthusiasm and creativity to their teaching. The extent to which administrators fail to consider the motivation of both students and teachers will impact the learning process. This premise for more autonomy supported environments in schools is also supported by the early work of Deci, Vallerand, Pelletier, and Ryan (1991).

As articulated in Ryan and Deci, "… great teaching will be derived from orienting educators toward and making them accountable for creating and implementing effective, evidence-supported classroom processes" (2017, p. 378). Professional learning and training would benefit from a focus on motivation and the need for autonomy, competence and relatedness. When teachers experience administrative support for their autonomy and competence, they become more likely to create supportive classrooms (Ryan & Deci, 2017, p. 373). The current research study would support that premise but

positions the psychological need for relatedness as underlying or underpinning the fulfilment of autonomy and competence.

School leaders need to create the circumstances in which learning and performing can be optimized. When we feel a sense of connectedness, are cared for and caring towards others, feel competent and have a sense of power to make decisions, there is autonomous motivation. Just as leaders work to support their employees, so must senior leadership. In the context of healthy and inclusive schools, district staff must also work to support the same for their school administrators in order to impact their motivation to lead - a key factor in transformational leadership (Gilbert & Kelloway, 2014).

Summary.

Self-determination posits that the human psychological need for autonomy and competence is enhanced when the need for relatedness and a sense of connectedness with others is nurtured and supported. The school environment has the potential to be an optimal social and learning environment where students and educators are able to continually grow and thrive. The following section expands on the core data categories and is followed by a discussion of the strengths and limitations of the research.

Trustworthiness and limitations of research

The research study was designed to explore the interrelated factors connecting healthy and inclusive high schools in New Brunswick. Using a constructivist grounded theory approach, twenty-one participants in five schools were interviewed and extant literature was reviewed to explore the underlying, interconnected factors.

When examining the trustworthiness and limitations of a particular qualitative study, it is important not to assume a quantitative lens. Inherent to any research design is the assumption of limitations, but within that assumption is the understanding that a particular method or methodology is appropriate for its purpose. With every type of methodology and research study there are various strengths and limitations, and the current research study carried out with a constructivist grounded theory approach is no different. Clarifying any limitations helps the research and scholarly community better understand under which conditions the results should be interpreted. This section provides an overview of the approach taken to ensure rigor in the assessment of the trustworthiness of the research and to address limitations within that context.

Trustworthiness of research findings

Consistent with qualitative research methods, a level of trustworthiness must be established. Thomas et al. (2005) described trustworthiness as a quality achieved in a study when data collected are generally applicable, consistent and neutral. Researchers employ different evaluation criteria to ensure trustworthiness and rigor of their research depending on the methodology used (qualitative, quantitative, mixed methods). For this research study, I used Guba's criteria as a comparative model to evaluate trustworthiness of my research findings. They include credibility, transferability, dependability and

confirmability (Anney, 2014; Shenton, 2004). According to Guba (as cited in Anney, 2014, pages 275-276), there are four questions that arise, including:1) how can a researcher establish confidence in their research?, 2) how can we determine applicability?, 3) can the findings be repeated?, and 4) how do we know that the findings area not influenced by bias, motivations or interests of the researcher?

Credibility.

Credibility is the confidence that can be placed in the truth of the research findings. Among its criteria are the adoption of well-established methods in qualitative research, an early familiarity with the culture of participants, triangulation of data, tactics to ensure honesty in participants when contributing data, interactive questioning, frequent debriefing, reflective commentary, member checks and examination of previous research findings (Anney, 2014; Shenton, 2004). These criteria often overlap in examining not only credibility, but also transferability, dependability and confirmability.

The use of a grounded theory approach in my research study meets the criterion of a well-established methodology in qualitative research, one that has continued to grow in its use in education and humanities research. Given my background as a middle and high school teacher as well as my time as a ministry of education employee, I have been immersed in the culture of teaching and education for over two decades. My background as a teacher, as well as choosing schools who were high performing in both areas, helped to develop trust with the participants. The data collection and analyses (both interviews and review of extant documents) took place over a period of 12 months, allowing time for me to understand the core issues impacting healthy and inclusive schools. Participants were assured of confidentiality from the beginning and this was reiterated during the

follow-up questions and member-checking interviews. Member checking is an important procedure for verifying findings and ensuring they are valid. The right to withdraw was present in the consent forms (Appendices C and D) and was verbalized during the interviews. Participants could also choose not to answer specific questions or, as in the case of one participant, ask to have the digital recorder turned off for specific comments. Meetings with my supervisors occurred frequently, and along with conversation with fellow graduate students, allowed for opportunities to test my developing ideas and to recognize any personal biases.

Transferability.

Transferability is the extent to which the results can be transferred to other contexts with other respondents (Anney, 2014). In qualitative research this means ensuring that there is theoretical and purposive sampling, and that it is the responsibility of the researcher to ensure that there is sufficient contextual information about the fieldwork sites so that the reader can infer transferability (Shenton, 2004). Since generalizability is not a goal of qualitative inquiry, it is important to establish transferability. Transferability is important when evaluating whether the results may be useful in other settings or to those conducting similar research. To establish transferability context, participants and settings are important and should be presented clearly (Sulz, 2014).

In the case of this research it was important to provide the number of schools and participants involved, the data collection methods used, and the time period over which the data were collected. In the end, the results must be understood within the context of a particular organization and geographical area (Shenton, 2004), which in this research

would be within the context of high schools operating within an inclusive education system in New Brunswick, Canada.

Dependability.

Dependability refers to stability of findings over time (Bitsch, as cited in Anney, 2014, p. 278), and it can be argued that a strong emphasis on credibility ensures dependability. Processes are detailed so that another researcher could repeat the study, if not necessarily obtain the same results (Shenton, 2004, p. 71). Ryan et al. (2007) argue that confirmability is often established when credibility and dependability are achieved. Within the current study, the research design and implementation were very detailed along with the methods used to obtain data. Detailed field notes, transcription and memoing helped support data analysis and strengthen the recommendations for educators and policy makers.

Confirmability.

The final component of Guba's model is that of confirmability, which is the degree to which findings could be corroborated by other researchers and confirming to the extent that the results are the results and experiences of the participants and not due to the biases of the researcher (Anney, 2014; Shenton, 2004). One of the strengths of the constructivist grounded theory approach used in this research study is the assumption that it is not possible to be completely unbiased. Additionally, the use of a reflection journal, triangulation and memoing, allowed me to be cognizant of any biases that presented themselves and to then follow up as to their meaning.

At times I found the language used in Guba's model cumbersome - an attempt to fit everything into the four criteria provided. Overall, however I found the use of the

criteria and strategies in the model beneficial in confirming the trustworthiness of the research findings. I am confident in the validation of the data and the resulting theory of Foundational Relatedness Theory.

Limitations

In addition to the possible constraints mentioned above, additional limitations could be considered for generalizability, theory development and participant selection. Firstly, as discussed above for transferability, it is noted that the goal of qualitative research is providing a rich, deeper understanding of the phenomena being studied and not generalizability. I do believe that these two concepts are not mutually exclusive and can overlap. However, I feel that this limitation is still worth noting. The current study is consigned to the context of high schools in New Brunswick and may be considered limiting beyond that scope. Additionally, New Brunswick has a definition of inclusive education that is encompassing of all students, not just those with disabilities, which varies from other jurisdictions. While generalizability may be limited due to the setting for the study and participant size, I believe that the results can be transferable, and allow readers to make connections between elements of the study and their own experiences.

A second limitation may be that the development of a theory itself could be considered a limitation. According to Birks and Mills (2015), many research studies employing grounded theory methodology do not actually generate theory (p. 109). They define theory as an "explanatory scheme comprising a set of concepts related to each other through logical patterns of connectivity." (p. 108). Moving to theoretical integration is challenging and it can be difficult to decide when theoretical saturations have been reached and theory developed. With the constant comparison of data and

advanced coding, member validation and extensive use of memoing, I feel assured that saturation was reached and that the subsequent theory that emerged was grounded in the data.

A third limitation could be seen in the selection of participants. While other professional and paraprofessional adults were mentioned in the interviews, e.g. educational assistants, administrative office assistants and custodians, the participants included administrators and teachers. While it is possible that the interview transcripts and initial coding would have looked different, I am confident that the underlying need for relatedness would be applicable to all adults within school environments. Subsequent research would suggest examining this premise in healthy and inclusive schools.

Implications for Practice

As research continues and governments set direction for systemic policies, it is the school as an educational institution and its educators who help prepare our children and youth for the future. As part of the larger community, schools and their educators provide safe, welcoming and affirming learning environments for learners. They work to prepare them for jobs that don't yet exist, they teach them collaboration and creativity, provide instructional support and intervention, and support their social-emotional learning, all on any given day.

The current research study generated theory that was grounded in the data and stated an intentional focus on fostering teachers' need for relatedness as the underpinning for competence and autonomy, contributing to healthy and inclusive high schools. For educators in New Brunswick to meet the demands of their work, they must have their psychological need for relatedness, competence and autonomy met, including the

processes, structures and policies to do so. While there is no one specific method or approach to ensure that this happens, suggestions include an emphasis on relationships, health and wellness, collective efficacy, social and professional capital and targeted professional learning within their zone of proximal development.

Social psychology posits that there is a basic need for belonging (Baumeister & Leary, 1995 as cited in Ryan & Deci, 2017; Wiley, 2017), a need to be connected to and accepted by others. This includes positive relationships with students and adults in schools. Not all interactions communicate relatedness. Coaching and mentoring to support all teachers, not just those who are new to the profession, would allow for relationships to be developed and nurtured at the same time as the need for competence is being realized. Administrators need to be able to support their educators' need for relatedness, competence and autonomy, but they also need processes and structures in place to ensure that their own needs are being met. Just as educators cannot fully support their students to function and grow optimally if their own needs are not realized, neither can school leaders expect to do the same.

According to John Hattie the number one influence related to student achievement is collective efficacy, (Hattie & Zierer, 2019). Collective efficacy in schools is the belief that educators can positively affect students and make a difference in their lives (Donnohoo, 2017), which begins with building relationships. According to Donnohoo, the consequences of collective efficacy include: greater effort and persistence, willingness to try new approaches, conveying high expectations, an increase in learner autonomy and a decrease in disruptive behaviour.

As the number of children and youth with mental health concerns is increasing, so is the number of adults with similar concerns. According to the Canadian Mental Health Association (2019), in any given year, one in five people in Canada will personally experience a mental health problem or illness. Add to this number those who have a colleague, family member or friend with a concern and the number is staggering. Teacher stress is increasing significantly. In an American Federation of Teachers (2017) study, as cited in Seton (2019), greater than sixty percent of teachers said their work is always or often stressful. If we want our educators to be able to support the wellness and growing mental health needs of our students, we must invest in their own wellness and health, from the provincial government level to the school community. Any comprehensive school health framework must focus on the adults as well as the students in our schools and communities.

Social capital is a term that has garnered interest in recent years. The Organization for Economic Co-operation and Development (OECD) in its 2001 report on the well-being of nations defines social capital as "networks together with shared norms, values and understandings that facilitate co-operation within or among groups" (p.41). It is as Lin (2001) stated, "an investment in relations with expected returns". In Gultekin's 2018 study exploring physical education teachers' level of social capital, it was found that there was a significant relationship between social capital levels and the teachers' job satisfaction. Cultivating social interactions and connections could see benefits for professional learning communities and improved outcomes.

The opportunity for teachers to have their voices heard amid a culture of transparency was evident during this study. The participants wanted to be seen, heard and

trusted as professionals. Despite calls for stability within the education system, change seems to be a constant. Educators need to be kept informed of changes that impact their students, schools, classrooms and their profession. Additionally, they need opportunities to provide input, both in group and individual contexts. An informed staff is one that is prepared to the best extent possible to meet the needs of their students and the system.

Professional learning is a required component of continuing education for educators. While there is a recognized need at times for provincial and district-directed professional learning, educators need to have access to professional learning that meets their individualized needs and school-based needs. As with students, it is important to provide targeted professional learning to meet the zone of proximal development and learning needs of educators. That includes embedded coaching and mentoring for both professionals and paraprofessionals within schools. We would expect nothing less for children and youth, and we should expect nothing less for the adults who teach and support them.

In implementing and sustaining inclusive education and comprehensive school health frameworks, the findings of this study supported the four pillars identified by the Pan-Canadian Joint Consortium for School Health, including social and physical environment; teaching and learning, school policy; and partnerships and services across both frameworks. The World Health Organization (2006) as cited in Sulz (2014) described health promotion as the process of empowering individuals to increase control over, and to improve their personal health through an environment that encourages healthy behaviour and promotes healthy choices. While research has largely focused on the impact of a comprehensive school health framework with children and youth, I argue

that school-based staff can also benefit from such an approach and impact the behaviour and the environment in which adults work. Schools are uniquely positioned to promote inclusion and health and to impact the behaviour of students and adults. Fulwiler's (2014) doctoral dissertation, revealed that an interdependent relationship exists between teacher wellness and comprehensive school health. They emphasized the importance of building relationships at all levels of education, encouraging a sharing of responsibilities to address challenges and teacher supports (p. 118). This lends support to having a healthy and inclusive promotion strategy with a whole-staff approach - one that can establish and sustain a culture of wellness for staff and students.

Implications for Policy

A well-written and developed policy that is implemented with appropriate resourcing, professional learning and evaluatory structures can provide a consistent standard and clarity for a system. When policy is developed without the above-mentioned context, it can lead to ambiguity and uncertainness for some and in some cases be relegated to a dusty shelf. The majority of participants within the study were not familiar with provincial policy to the extent that they could articulate, beyond a cursory level, its purpose and impact on their schools and classrooms. They perceived a disconnect amongst the development, release and implementation of provincial policy.

In Delaney's (2002) work on bridging the divide between policy and practice in education policy, he states that policy dissemination is often overlooked. Downey (1988, as cited in Delaney, 2002, p 45.) suggests that there are four assumptions for policy implementation. The first is that since policy is supposed to be future oriented and a catalyst for change, it is not surprising that it is sometimes met with negative attention.

Secondly, policies can be deemed suspect by the professional educators if they were not involved it its development; Thirdly, policy development and implementation tends to unfold within a context of community power and political influence, which can thwart the process; and finally, implementation of new policy calls for new commitments and extra expenditures, which are not always possible. In their work on education policy implementation for the OECD, Viennet and Pont (2017) identified additional reasons that prevent implementation from being effective, including a lack of focus on the implementation process; a lack of recognition that the core of change processes requires engaging people; and the fact that implementation processes need to be revised to adapt to new priorities and initiatives (p. 6-13).

Considering the findings of the current study, implications for policy would recognize the importance of transparent and authentic consultation with stakeholders, in this case, educators, but also with students, family and community. Consideration of educator voice and input would help to ensure the development and/or updating of policies that reflect the reality of schools within a healthy and inclusive learning environment. Additionally, providing opportunity to be involved would support their need for relatedness, competence and autonomy.

It is crucial to understand policy and to provide ways in which it can be more effective and transparent. Education policy development and implementation have an impact beyond the school learning environment and can be felt within families and communities. As a result, implementation must be carefully considered. It is not sufficient for policy makers to mandate policy alone. In their review of self-determination and public policy, Moller, Ryan and Deci (2006) stated that using mandated and

controlling methods are not effective to maintaining changes in behaviour and well-being. While policies can motivate initial change, it is not sustained long term or maintained when contexts change. This idea is supported with this study as participants in this study emphasized needing to know the "why", the rationale for changes impacting a school.

As already discussed, as humans, we have a psychological need to feel autonomous. To have effective change with policy implementation, it is important to support individuals to make choices in their contexts while providing them with relevant structure and information (Moller, Ryan, & Deci, 2006). A policy that is autonomy supportive is one that is not driven by fear, and instead provides a credible rationale that speaks to their context. This is not to assume that Self-Determination Theory advocates the removal of all structures and provide no guidelines. It recognizes that there is a need to provide relevant information, structure and limits. When this is presented in an autonomy supportive way, it can facilitate autonomy. SDT also supports the importance of consulting with educators, allowing for their voices to be heard and considered, and highlights the need to communicate policy and its implications effectively.

Education policy is complex and can involve many partners and stakeholders. Participants in this study brought up the need for accountability measures to ensure that policies are being monitored and implemented with integrity. While policies often undergo a cycle of review, this was information that was not familiar to participants. They cited a lack of evaluation data and a perceived unwillingness on behalf of government to undertake evaluation as problematic to systemic growth. Participants also identified that a lack of resources and professional learning impact the degree to which

this can happen. Appropriate resourcing is needed for success and given that the tenuous nature of political parties within the provincial four-year election cycle is problematic, the designation of funds to support implementation is not guaranteed and poses a challenging dilemma. In considering future policy development and implementation, caution is urged to consider all factors, including appropriate consultation, resourcing and evaluation, or risk failure.

Implications for Future Research

The current research study yielded a plethora of data with many possibilities for continued and future research. Future research can be focused in several areas including building on Foundational Relatedness Theory; the theory of relatedness as the underpinning for competence and autonomy contributing to healthy and inclusive schools. Other avenues of research include expanding on the data related to the zone of proximal development and learning for adults, autonomy at the local level in schools and approaches to meeting the needs of students with severe disruptive behaviour.

Building on Relatedness.

The current study provides a rich data source for examining healthy and inclusive schools. There is also recognition that there is a need to fill in the research gaps in order to have greater transferability. This research study was focused on healthy and inclusive high schools in New Brunswick, Canada and participants consisted of administrators and teachers within the participant schools. Possibilities for continued research in this area include expanding the participants to other adults in the schools including paraprofessionals such as educational assistants, school intervention workers, administrative assistants and custodians. Would relatedness emerge as the foundation for

all adults in the schools? It would also be a natural extension to explore students as participants within these and other schools.

As I began to integrate the literature of Self-Determination Theory into this dissertation I was struck by the lack of research specifically examining the impact of the psychological need for relatedness, competence and autonomy for school-based staff and in particular for school-based administrators. It could be argued that the research that exists on Self-Determination Theory in the workplace could be transferred to the school learning environment as a workplace for educators. However, educators and other school-based staff are uniquely positioned for future research for several reasons. Firstly, there is an increasing focus on schools and school-based staff to ensure that they are providing a learning environment that supports students' need for relatedness, competence and autonomy. How can that happen effectively, if their own psychological needs are unmet in their workplace? Secondly, school-based staff are working in an environment where they as children and youth spent their formative years. Finally, there has to be recognition of the role of administrators in Self-Determination Theory. Not only do they have a role in creating a learning environment for students that supports their psychological needs, but they also are critical in creating a work environment that does the same for their staff. This begs the question, who is helping to support administrators in their need for relatedness, competence and autonomy?

As identified in the methodology chapter, one of the reasons in requesting schools that performed well on indicators of both inclusion and comprehensive school health was my current professional role. There was concern that rapport and openness would be impacted if I were to collect data in a school that was high performing on either inclusive

education or school health, but not both. While this is still a concern, it would be beneficial for the researchers to explore. This is perhaps something that another graduate student or researcher could investigate under my supervision.

A further extension of this and future research would be to develop and validate a self-assessment tool for school-based staff, including administrators, to self-assess along a continuum to provide insight and reflection into how their workplace helps to support their need for relatedness, competence and autonomy, including the systems, structures and policies that allow this to happen. This tool would go beyond the self-assessment of a typical workplace climate to reflect the distinctive context of a school as the workplace. A self-assessment provides a broader lens and helps to reflect on strengths and needs. It can be used to inform targeted professional learning needs and serve as a check point for managing change. Such a tool would help to close the gap between research and practice in our schools as learning and working environment.

Additional avenues of research.

While immediate next steps for future research would involve building on relatedness, future research that connects the zone of proximal development and learning for school-based staff would be an exciting avenue for researchers to pursue. It could be seen as a proactive, strength-based approach that would contribute to adult learning research, including embedded professional learning as well as coaching and mentoring.

One of the many things that stood out from this research study was that all administrators indicated that they had site-based autonomy to effectively lead their schools. This was noticeable in schools where teaching assignments and learning environments were configured to meet the needs of students and the context of the individual schools. In the New Brunswick Department of Education and Early Childhood's recent paper, *Succeeding at Home: A green paper on education in New Brunswick*, there are calls for increased autonomy in New Brunswick schools and a reduction in what is seen as teacher red tape. As the province moves forward, it is suggested that they build on the research and successes that are already happening across the province.

Aside from the data that emerged on the underpinning on relatedness in this study, I was most excited about the approaches and mindset that high schools were using to view the needs of students with severe disruptive behaviour. As discussed previously, an admitted bias as I began the interviews with participants, was thinking that it would be a significant concern for them. While responses given during the validation of interview results ranged from processes and strategies in place to actual declines in behaviour concerns and suspensions, it is an area that warrants further research.

Summary of Research Study

This study aimed to investigate the interconnected frameworks of healthy and inclusive schools. Twenty-one participants from five New Brunswick Anglophone high schools were interviewed over a period of six months. Participating schools performed well on indicators of both inclusive education and comprehensive school health. Interview and extant data were analyzed to answer the question of what interconnected factors were at play that allowed for successful and effective implementation of both frameworks.

A constructivist grounded theory approach was chosen for this undertaking. Moving from the labour-intensive process of line-by-line coding into initial coding and to a more focused coding approach allowed for the constant comparative analysis that identified six core categories. The core categories that emerged from the data included: overarching assumptions; universal relatedness practices; systems structures and policies for relatedness; systems, structures and policies for competency; systems, structures and policies for autonomy; and understanding successful change, all of which have an impact of healthy and inclusive schools. The analysis and subsequent integration focused my research in a different area. My initial presumption was that the data would be focused on the interactions with students, and to some extent, it did. However, it became evident that what was connecting these schools was their intentional focus on the educators in their buildings and on meeting their psychological needs.

The most challenging component of the data analysis process was moving from focused coding into theoretical coding and theoretical integration. Many research studies using constructivist grounded theory often do not move into this stage of analysis. Key to

this process was the use of memoing. Without the use of this process, I do not believe it would have been possible to achieve theoretical integration of the data.

Integrating the data, along with the work of Deci and Ryan's Self-Determination Theory and Paul Ricoeur's ideas on oneself as another, a Foundational Relatedness Theory was constructed. An intentional focus on fostering teachers' need for relatedness emerged as the underpinning for competence and autonomy, contributing to healthy and inclusive schools.

These results have implications not only for future research, but for practice and policy development. Currently, there is no published research that presents the interconnected factors between inclusive education and comprehensive school health. The limited research available focuses on supporting students in school learning environments and on supporting adults in various workplaces, with the exclusion of schools. Providing intentional and purposeful opportunities for relatedness where adults feel involved and connected in a respectful and authentic environment provides the groundwork for a strong foundation to support their needs for competence and autonomy. When educators have the structures, processes and policies in place to have their psychological needs met, and are part of supportive change, they are better positioned to be able to support their students in having their needs met, leading to better outcomes for all. The findings of this research will help bridge the divide between research and practice while providing the beginnings of a road map to support school-based staffs.

Personal Reflection

This research interest grew out of a decades long career in education as a middle and high school classroom and special education resource teacher, and in more recent

years as an employee with the New Brunswick Department of Education and Early Childhood Development. For most of the past 24 years, I have had the privilege to connect with the dedicated professionals who work in our schools and communities to support children, youth and their families, committed to the education of all. I was sensitive to the increasing demands placed on educators and to the structures and processes required to meet those demands within healthy and inclusive schools.

I chose constructivist grounded theory as it allowed for recognition of my own experiences while giving voice to those of the participants. Not only was it the right choice for this research study, its applications have extended into my work environment. Guidelines for self-checking my biases and the uses of memoing have been beneficial in interactions and in strategic planning.

My committee has provided direction while allowing me to walk my own path. I have stopped, started, and repeated my steps many times. I have learned to trust my researcher instinct even when it led me in unexpected directions. This process has been a significant growth experience for me and one for which I am immensely grateful.

Conclusion

As I conclude this dissertation I once again reflect on the journey that has been a huge part of my life over the past few years. In many ways, I feel that I am standing on a precipice both in terms of taking the next step in my research but also for the world of education. As a system, educators are being asked to revision what the role an education system should play for the future and for society in a post-industrial age.

New Brunswick schools are tasked with improving health and education outcomes for students, all at a time when the world is changing at an ever-increasing

speed. From a policy and practice perspective, this is increasingly complex. “Building organizational capacity for health promotion in schools and districts is a long-term process that requires systemic attention to the development of structures, external supports, policies, resources, and professional development,” (Hoyle, Samek, & Valois, 2008, p. 8). Comprehensive school health and inclusive education are respected frameworks for promoting health and wellbeing, yet without supports and resources to support the health and wellbeing of educators and other adults in our schools, CSH and inclusion will not reach their full potential.

This study highlighted the importance for educators to understand successful change and to have the necessary systems, structures and policies in place to ensure their psychological needs of competence and autonomy, and, the need for relatedness are supported in their working environment. Individuals who perceive that these needs are being met will be more intrinsically motivated to engage in other proactive, positive behaviours (Sulz, 2014). Key to this will be an intentional and purposeful fostering of educators’ need for relatedness. Fostering and nurturing this need will provide a strong underpinning for the psychological needs of competence and autonomy. Many of the participants in this study stated that “it all comes back to relationships,” both for the students and the educators. During the October 2019 New Brunswick Summit on Education, Assistant Deputy Minster, Chris Treadwell stated that, “people are our most important resource.” Despite this statement, increasing pressures on today’s educators affect their own wellness and performance, and impact the fulfillment of their need for relatedness, autonomy and competence. Self-Determination Theory could be used more extensively as a school-wide approach with educators (Sulz, 2014). A whole school

approach framed within Self-Determination Theory may be an effective strategy for building a comprehensive school health and an inclusive education framework. This is a long-term investment but one that will see students and educators feeling connected to each other and to their learning and working community.

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Appendix A: Superintendent Correspondence and Consent

Superintendent (Insert Name)
Anglophone School District – (Insert Name)
Insert Address
Date: to be inserted

RE: Applying the Interrelated Frameworks of Healthy and Inclusive Schools

Dear Superintendent (Insert name):

I am currently a doctoral student in the Faculty of Education, at the University of New Brunswick. My proposed research focuses on applying the interrelated frameworks of healthy and inclusive high schools to help inform future policy and practice. Specifically, it examines the factors and processes that support inclusive education and school health and how they are interrelated. Potential site selection is to be undertaken by the Superintendent or designate.

I would like to observe and interview school staff in high schools that meet the following criteria:

- Schools that meet or exceed performance expectations on school improvement review data and the NB Wellness Survey data
- Schools that have an administrator with three or more years' experience
- An administrator with knowledge of change process

I would appreciate the opportunity to meet potential school principals in your district to determine whether their schools might be part of a more in-depth research process. This would allow for observation and questioning determining how schools implement policy and provide an environment that is both healthy and inclusive.

Attached is information pertaining to the study, including a summary of the research study, consent and an observation and interview schedule. If you have any questions pertaining to the study, you can contact me at (506) 440-5231 or by email at j14vn@unb.ca. You may also contact Dr. Patricia Peterson or Dr. William Morrison, my supervisors with the Faculty of Education by calling (506) 458-7187 or (506) 447-3301.

Sincerely
Kimberly Korotkov

School District Consent to Participate in Research Study

As the Superintendent (or designate) of the Anglophone School District (insert district name), I confirm that the school district grants permission for the proposed research, *Applying the Interrelated Frameworks of Healthy and Inclusive Schools*, contingent upon UNB Research Ethics Board approval. The research will take place at (insert school name). I am aware that this research is being conducted as partial fulfillment for the requirement of Doctoral Studies in Education. My participation and information provided will be kept confidential and my anonymity will be respected.

Superintendent Signature _____
Date_____

Researcher Signature _____
Date _____

Do you wish to receive to receive a summary report of the study findings?

Yes

No

If yes, please provide both an email and postal address below.

Appendix B: Summary of Research

Research Study:

Applying the Interrelated Frameworks of Healthy and Inclusive Schools

Background Information:

Inclusion of students and comprehensive school health are two important social and public policy frameworks that impact educators on a daily basis. Healthy students are better learners; and better educated individuals are healthier.

This study will explore what high schools do that results in successful implementation of both frameworks and how they maintain an environment that is both healthy and inclusive. I will be observing and interviewing school staff in high schools that met or exceeded performance expectations on school improvement review data and the NB Wellness Survey data. The period of data collection will be during the 2017 and 2018 calendar year.

The study will contribute to an understanding of the factors that add to the knowledge and practice of both educators and policy makers, and will potentially lay the foundation for systemic change within policy development and implementation in New Brunswick schools.

Research Methodology:

Your participation will be limited to:

- Providing your written consent to participate in the study
- A personal interview with you to provide confidential responses to the interview questions provided
- Observation of your teaching practices within your school and classroom on two or more occasions
- Providing your feedback on the transcribed interview responses and observations

Right to Withdraw:

Your participation in this research study is voluntary. You have the right to withdraw from the study at any time, without reason or prejudice. Should you choose to withdraw, please contact the principal researcher or supervisor as soon as possible.

Anonymity and Confidentiality:

All research will be conducted according to the policies, standards and ethical guidelines approved by the School of Graduate Studies, University of New Brunswick. Copies of the above can be provided upon request. Your school and school district will be assured of confidentiality throughout the research process and the reporting of any findings. Data collected will be kept secure and confidential at all times.

Contact Information

Principal Researcher
Kimberly Korotkov
Email: j14vn@unb.ca
Telephone: (506) 440-5231

Research Supervisor(s)
Dr. Patricia Peterson
Email: plp@unb.ca
Telephone: (506) 458-7187

Dr. William Morrison
Email: wmorriso@unb.ca
Telephone: (506) 447-3301

Associate Dean, Graduate Studies, Faculty of Education
Email: dwagner@unb.ca
Telephone: (506) 447-3294

Appendix C: Consent to Participate in the Research Study
Applying the Interrelated Frameworks of Healthy and Inclusive Schools

Dear Principal (Insert Name):

Thank you for your willingness to participate in the research study, Applying the Interrelated Frameworks of Healthy and Inclusive Schools. The following will be required as part of your participation:

- Providing your written consent to participate in the study
- A personal interview with you to provide confidential responses to the interview questions provided
- Observation of teaching practices within your school and classroom on two or more occasions
- Providing your feedback on the transcribed interview responses and observations

All information provided will be kept secure and confidential. Your name, school and school district will be given pseudonyms and will remain anonymous. As a volunteer, you may withdraw any time without harm or prejudice. A summary copy of the final research report will be available at your request. The results of this study will help identify the factors that make our schools both healthy and inclusive. Recommendations will be made for future practice and policy.

Please sign the consent form below and return in the stamped addressed envelope. If you have any questions, please contact Kimberly Korotkov at (506) 440-5231or by email at j14vn@unb.ca.

Contact Information

Principal Researcher

Kimberly Korotkov
Email: j14vn@unb.ca
Telephone: (506) 440-5231

Research Supervisor(s)

Dr. Patricia Peterson
Email: plp@unb.ca
Telephone: (506) 458-7187

Dr. William Morrison
Email: wmorriso@unb.ca
Telephone: (506) 447-3301

Associate Dean, Graduate Studies, Faculty of Education

Email: dwagner@unb.ca
Telephone: (506) 447-3294

School Consent to Participate in Research Study

As the Principal of (insert school name), I am aware of the research procedures for the study, I give permission for the I confirm that the school district grants permission for the proposed research, *Applying the Interrelated Frameworks of Healthy and Inclusive Schools*. I give permission for the study to take place at (insert school name) and for the research to have contact with educators at this site. My permission is contingent upon (insert school district name) school district permission and UNB Research Ethics Board approval. I am aware that this research is being conducted as partial fulfillment for the requirement of Doctoral Studies in Education. My participation and information provided will be kept confidential and my anonymity will be respected.

Principal Signature _____
Date_____

Researcher Signature _____
Date _____

Do you wish to receive to receive a summary report of the study findings?

Yes

No

If yes, please provide both an email and postal address below.

Appendix D: Consent to Participate in the Research Study
Applying the Interrelated Frameworks of Healthy and Inclusive Schools

Dear Participant:

Thank you for your willingness to participate in the research study, Applying the Interrelated Frameworks of Healthy and Inclusive Schools. The following will be required as part of your participation:

- Providing your written consent to participate in the study
- A personal interview with you to provide confidential responses to the interview questions provided
- Observation of your teaching practices within your school and classroom on two or more occasions
- Providing your feedback on the transcribed interview responses and observations

All information provided will be kept secure and confidential. Your name, school and school district will be given pseudonyms and will remain anonymous. As a volunteer, you may withdraw any time without harm or prejudice. A summary copy of the final research report will be available at your request. The results of this study will help identify the factors that make our schools both healthy and inclusive. Recommendations will be made for future practice and policy.

Please sign the consent form below and return in the stamped addressed envelope. If you have any questions, please contact Kimberly Korotkov at (506) 440-5231or by email at j14vn@unb.ca.

Contact Information

Principal Researcher

Kimberly Korotkov
Email: j14vn@unb.ca
Telephone: (506) 440-5231

Research Supervisor(s)

Dr. Patricia Peterson
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Associate Dean, Graduate Studies, Faculty of Education

Email: dwagner@unb.ca
Telephone: (506) 447-3294

Individual Consent to Participate in Research Study

I _____, consent to participate in the research study as outlined. I am aware that this research is being conducted as partial fulfillment for the requirement of Doctoral Studies in Education. My participation and information provided will be kept confidential and my anonymity will be respected.

Participant Signature _____
Date_____

Researcher Signature _____
Date _____

Do you wish to receive to receive a summary report of the study findings?

Yes

No

If yes, please provide both an email and postal address below.

Appendix E: Participant Interview Protocol and Questions

Staff "A" -

Years Teaching -

Position -

Degrees/Training -

Interview Materials

Consent form
Audio recording equipment
Paper and pen

Welcome – Explain purpose of interview

Thank you for agreeing to participate in this interview. My name is Kimberly Korotkov, and I'll be asking a series of questions that look at what high schools do that result in successful implementation of the frameworks of healthy and inclusive schools.

Did you have any questions about the consent form or the process?

Ground Rules
Everything you say will be confidential. To protect your privacy, you will be assigned a pseudonym. At any time during our conversation, please feel free to let me know if you have any questions or if you would rather not answer any specific question. You can also stop the interview at any time for any reason. Is it ok if I audiotape this interview today?

Semi-structured Interview Questions

1. How do you define a healthy school?
2. What are the contributing factors and processes in a healthy high school?
3. What does it look like in practice?
    a. What supports are needed in your school?
    b. How are they used effectively?
4. What are the indicators for a healthy high school?
    a. How do you know when you are successful?

5. How do you define an inclusive school?
6. What are the contributing factors and processes in an inclusive high school?
7. What does it look like in practice?
    a. What supports are needed in your school?
    b. How are they used effectively?
8. What are the indicators for an inclusive high school?
    a. How do you know when you are successful?
9. What is your understanding of provincial policy that impacts health and inclusive schools?
10. What is your understanding of change leadership?
11. What recommendations would you have for future policy development or implementation?
12. Other

Closing

(Start time _____ End time_____)

Is there anything else that you would like to add about any of the topics we have discussed or other areas that we didn't discuss, and you think are important?

Thank you for your time and participation in this interview.

Curriculum Vitae

Candidate's Full Name:

Kimberly Ann Baker- Korotkov

Universities Attended:

Doctor of Philosophy in Education Studies, University of New Brunswick, 2010-2019

Universal Design for Learning – Addressing the Variability of all Learners, Harvard Graduate School of Education, 2013

Third Party Neutral Program – Mediation, University of New Brunswick, 2012-2013

Master of Education, in Curriculum and Instruction, Queen's University, 1997-2001

Bachelor of Special Education, Memorial University of Newfoundland, 1993-1995

Bachelor of Education, Memorial University of Newfoundland, 1988-1993

Publications:

Baker-Korotkov, Kimberly & Bastin, Tiffany (2019): Die landesweite Implementierung des, Universal Design for Learning' in New Brunswicks inklusivem Bildungssystem. In: Jahr, David & Kurschel, Robert (2019): Inklusion in Kanada. Internationale Perspektiven auf heterogenitätssensible Bildung. Weinhei: Beltz Juventa, S. 282-299.

Korotkov, D., Perunovic, M., Claybourn, M., F., Houlihan, M., MacDonald, M., & Korotkov, K.A. (2011,). *The Type B Behavior Pattern as a moderating variable of the relationship between stressor chronicity and health behavior*. Journal of Health Psychology, April,16(3).

Baker, K.A. (2001). *Reading instruction with poor readers: A comparison of the PASS reading enhancement program (PREP) to a teacher-developed phonics-based program*. Published master's thesis. Queen's University, Kingston, Ontario.

Baker, K.A., & Parrila, R. (1998). *Helping teachers weather the storm? A review of the SNOW (Special needs opportunity window) website*. Developmental Disabilities Bulletin, Fall.

Conference Presentations:

Baker-Korotkov, K.A. (2019, November). *Developing and implementing an inclusive education system.* National Council for Special Education Annual Research Conference, Dublin, Ireland.

Baker- Korotkov, K.A. (2019, March). *Inclusive practices*. Symposium on Inclusive Education, Dublin, Ireland.

Korotkov, K.A. (2016, October). *Inclusionary Practices: Strategies and Resources for K-12 Educators.* New Brunswick Teachers Association, Compass Conference, New Brunswick, Canada.

Korotkov, K.A., & Bastin, T. (2016, August), *Engaging Educators in System-wide Implementation of Universal Design for Learning.* 2nd Annual UDL Symposium: Building UDL community and practice around engagement, Harvard University, Cambridge, Massachusetts, USA

Korotkov, K.A. (2016, August) *Universal Design for Learning and Self-Determination: A dual approach to student empowerment and success.* Youth in Action Summit, New Brunswick, Canada.

Korotkov, K.A. (2016, April), *Screening for success and psycho-educational assessment.* 2016 Atlantic Symposium on Learning Disabilities: Literacy, Learning Disabilities and Cognitive Strategies', Fredericton, New Brunswick, Canada.

Korotkov, K.A. (2016, April). *All Kinds of Minds*. 2016 Atlantic Symposium on Learning Disabilities: Literacy, Learning Disabilities and Cognitive Strategies, Fredericton, NewBrunswick, Canada.

Korotkov, K.A. (2013, November). Response to Intervention: Service Delivery Model for New Brunswick Schools, Paper presented at the first annual Atlantic Disabilities Symposium for Learning Disabilities Conference, Fredericton, New Brunswick, Canada.

Korotkov, K.A., & Kelly, B. (2011, April). Student Services Standards: Professional Implementation and Accountability. Paper presented at the annual Council for Exceptional Children Conference, Washington, D.C., USA.

Korotkov, D., & Baker, K.A. (2007, January). What to explain: A multileveled model for applying class material. Paper presented at the Twenty-ninth Annual National Institute on the Teaching of Psychology Conference, St. Petersburg, Florida, USA.

Korotkov, D., & Baker, K.A. (2006 August). Personality and Health: Theoretical and Methodological Issues. Paper presented at the American Psychological Association Conference, New Orleans, USA.

Baker, K.A., & Bortolotti, S. (1998, May). Theory-based remediation. Paper presented at the Canadian Society for the Study of Education (CSSE) Conference, Ottawa, Ontario, Canada.

Baker, K.A., Bortolotti, S., Etmanskie, J., Jacob, P., Kirby, J.R., & Parrila, R. (1998, March). Phonological and PASS processes as predictors of reading and reading problems. Paper presented at the Twenty-third Annual International Conference on Learning Disabilities, Montreal, Quebec, Canada.

Korotkov, D., & Baker, K.A. (1995, June). Examining the efficacy of a number of new pedagogical techniques based on a multi-media approach to instructional. Paper presented at the Annual Canadian Psychological Association Convention, Charlottetown, P.E.I, Canada.

Korotkov, D., Hannah, T.E., & Baker, K.A. (1995, June). A model comparison linking personality to life stress health, health behaviors, & physician utilization. Paper presented at the Annual Canadian Psychological Association Convention, Charlottetown, P.E.I, Canada.

Korotkov, D., & Baker, K.A. (1996, August). The teaching of structural equation modeling: A metacognitive approach. Paper presented at the International Congress of Psychology, Montreal, Quebec, Canada.