

The Three R's of the Success Case Model - Recruitment, Response, Rigour

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Abstract

An argument against employment of the Success Case Study methodology is that it promotes optimistic and potentially uncritical findings. This paper advances that in the authors' experiences the latter has been substantially disconfirmed in terms of rigour and, additionally, the approach has offered considerable advantages for entry, recruitment and openness of respondents.

Three 'success' case study examples illustrate the design adopted by the authors, the benefits linked to the methodology including the rigour associated with findings.

Introduction

The paper begins with a review of the literature from the Success Case Study (SCS) field that includes the history of the methodology, as well as application and research that has been reported associated with the design. In particular, the limited previous research that has highlighted any impact of the design on entry, recruitment and response behaviour, and rigour is examined. The literature review is followed by an outline of the design model and features adapted for use in the authors' own research, and their perceptions of benefits linked to the design. In the next part of the paper, three examples illustrate the design and benefits. Finally conclusions and implications are drawn from the case studies.

Background Literature and Design of SCS

Success Case Studies (Brinkerhoff,(2003) are a subset of the more traditional case study method where a single unit analysis is based upon depth that is both holistic and exhaustive (Bassegy, 2007) but which also retains the meaningful characteristics of realistic events. Traditional case studies investigate a contemporary phenomenon within a real-life context (Wetherell, 2003) and they are especially powerful when the boundaries between phenomenon and context are not clearly evident (Yin, 1994). Brinkerhoff (2005) describes SCS's as combining the ancient craft of storytelling with more current evaluation approaches of naturalistic inquiry, case study, and narrative research methodologies. As he reports:

A success story is not considered valid and reportable until we are convinced that we have enough compelling evidence that the story would 'stand up in court'...if pressed we could prove it beyond a reasonable doubt (Brinkerhoff 2003:20).

The Success Case Study Method (SCM) achieves efficiencies by focusing the bulk of inquiry on relatively few subjects. The underlying notion is that we can learn best from those subjects who either have been exceptionally successful in applying their learning in their work or have been the least successful (Brinkerhoff, 2005). This is supported by Coryn, Schöter and Hanssen (2009) who suggest that SCM is best suited for inquiries targeted at small to medium populations, where alternative explanations for an observed effect can be thoroughly probed and internal validity threats of causal claims about whether an intervention 'works' or actually produced an observed effect can be identified and ruled out.

Brinkerhoff (2006) explains that SCM is based on solid rules and discipline of scientific inquiry. It uses many of the typical evaluation tools such as survey, interviewing, focus groups and sometimes statistical analysis. SCM analyses the most and least successful groups because traditionally these extremes are masked when the mean and other central tendency measures are employed, as Brinkerhoff (2005) explains:

Training programs are almost never completely successful such that 100% of the participants use learning on the job in a way that drives a business result. Similarly, almost no program is ever a 100% failure such that no trainee ever uses anything for any worthwhile outcome. A typical quantitative method that uses mathematical reduction to derive effect estimates (a mean effect rating, for example) will always under-represent the best and over-represent its worst. Such is the tyranny of a mean or average: If you were to stand with one foot in a bucket of ice cubes and the other foot in a bucket of scalding water, on average you should be comfortable; in reality, you are suffering doubly! (p. 92)

SCM is generally employed with the intention of assessing how well an organisational intervention is working (Coryn et al., 2009). Recently, SCM has been proposed as an alternative approach for examining causal associations when more scientifically rigorous, sophisticated, and elegant designs are unethical, impractical, too costly, or simply not feasible (Coryn et al., 2009; Scriven, 2006).

Brinkerhoff (2003) considered that the SCM should involve a two-part component. The first is that of locating potential success, and non-success, cases: the second part involves determining and documenting the nature of the success and non-success. Both Barrington (2004) and Bailey, Clinton, Laing, Nunns, and Roorda (2006) have summarised the following five steps in the traditional, Brinkerhoff, design of SCM:

1. Focus and plan the SCS
2. Create an 'impact model' that defines what success should look like
3. Design and implement a survey to search for best and worst cases
4. Interview and document success and non-success cases
5. Communicate findings, conclusions and recommendations.

Bailey et al. (2006) remind us that the core questions of the SCM approach are:

- what is really happening?
- what results are being achieved?
- what is the value of the results?
- how can it be improved?

Barrington (2004) notes that SCM can produce a number of benefits to organisations including: an increased commitment to, and support for, training; an increased capability to achieve results from learning; and a greater capability to meet emerging needs. Barrington also states that the approach can be a quick way to determine if a full-fledged evaluation is required, and it is cost and time effective.

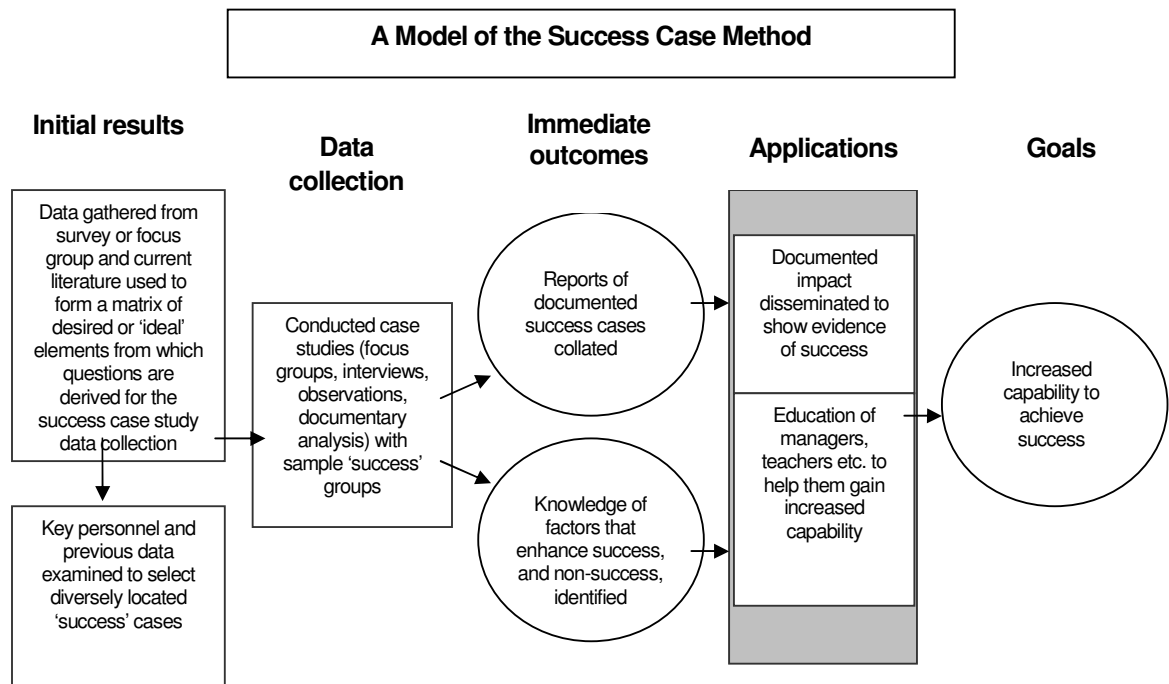
Bailey et al (2006) are amongst the few authors to report in detail on the use of SCM. They described SCM in an evaluation of housing in Aotearoa New Zealand (NZ). The authors reported rich learning in the case stories and concluded that SCM was a robust model that stood up to adaptation, enabled application in differing community settings (especially with cultural diversity), and was perceived to have been effective by the organisational and community stakeholders. They stated, in summary, that the approach met the evaluation standards of propriety (in NZ, the extent to which the national treaty between indigenous Maori and non-Maori, the Treaty of Waitangi, is taken into account), utility, accuracy, and feasibility to assess the success of the transfer of the approach to diverse community settings. In particular, they stated that when the SCM is used in conjunction with other research approaches its accuracy and robustness are evident.

Alternative Design

The traditional SCM design therefore emphasises both examining successful and unsuccessful features in the case studies. Our approach to the design has adapted the earlier noted Brinkerhoff traditional steps at points three and four. We deliberately selected only success cases, rather than the inclusion of unsuccessful cases.

Figure 1 shows the way in which we have adapted the original model for SCM for use within the examples of evaluation that are reported upon later.

Figure 1: Summary of Success Case Method



Adapted from Brinkerhoff and Dressler (2005).

In this design very similar questions to those offered as Barrington's (2004) 'interview buckets' were introduced in the data collection phase, that is: what was used?; what results were achieved?; what good did it do (value)?; what helped?; what barriers existed?; what enablers existed?; and what suggestions could be made for improvement? These questions helped the authors to reveal the complexities and stories within success rather than suggesting that success and positive initiatives occur from an absence of challenges or need for improvement.

There were several reasons for the adoption of the alternative, more success orientated, design. First, with each of the case studies, much was already known about the challenges, poor practices and barriers. Second, a short time frame for each piece of research and the desired outcome of revealing exemplar practices also meant that the particular focus on success cases was suitable as well as pragmatic. Further, this alternative design focus also held advantages in relation to the recruitment of sites and the willingness of participants to become involved within a sector which is traditionally difficult on both issues. In the education sector, regardless of level, teachers in NZ have high workloads and each of the authors has experienced difficulty in gaining access to sites and recruiting research participants. It was decided that identifying sites as 'successful' might enhance access.

The deliberate focus on success did not mean, however, that only positive aspects would be revealed. On the contrary, as seen in the results reported upon in this paper, much was learnt from finding out how teachers overcame challenges and barriers. In other words 'success' was never a synonym for perfection or without the need for improvement. Much has been written about 'failed' initiatives and 'failed'

approaches (Wallace, 2003), however little research focuses primarily on 'success' as a way of setting an agenda for future change (Brinkerhoff, 2003). The example projects sought to identify and explain the contextual factors of successful initiatives as a way of helping to determine the value those success focussed initiatives might have been capable of producing, and whether they could be leveraged to a wider constituency to assist in improved and sustained success in similar settings (Marshall, 2008).

Examples Illustrating the Design

Three examples of SCS's that conform to the alternative design are used to highlight the benefits associated with initial entry to research sites, recruitment of participants and response behaviour, and rigour. The first example is from the evaluation of the national school teacher induction programme in NZ, the second from the evaluation of development programme for special education teachers, and the third from the examination of effective change leadership in the tertiary context.

Teacher Induction

The research on teacher induction was commissioned by the NZ Teachers Council (NZTC) and was the third and final phase of a research series designed to investigate the nature and quality of advice and guidance (induction) provided to Provisionally Registered Teachers (PRTs) in NZ (Aitken, Bruce-Ferguson, McGrath, Piggot-Irvine & Ritchie, 2008). Overall, the exploration was designed to identify: (a) issues that support good induction practice (including contextual supports); (b) exemplars of good induction practices and ways of dealing with problematic situations; (c) indicators of how PRTs develop their professional learning to a level where they can be awarded fully registered teacher status; and (d) assessment and moderation processes that lead to PRTs being granted full teacher registration (Aitken et al, 2008). A goal for the research was to provide an evidence base for the development of induction policies and advice across four education sectors: early childhood education (ECE), primary and secondary, and indigenous Māori medium settings.

The SCM (Brinkerhoff, 2003) was adopted because it was considered that it might allow easy access given the relatively short time frame available for the research within education sectors known for poor accessibility for research. Both information gathered in the first two phases of the research (a literature review, and broad survey and focus groups) and indicators from additional research were used to inform the establishment of criteria for success in terms of effective/exemplary induction practices, systems and contexts. Success case sites (20 in total, 5 per sector) were selected based on recommendations from a NZTC reference group and local educational advisors to ensure variations in size of the site, location (urban, rural), decile (socio-economic level), and sector. Data collection included focus groups, one-to-one interviews, and documentary analysis.

In terms of *entry (access to the research sites) and recruitment*, the relatively small number of cases were chosen because, as Denzin and Lincoln (2000) argue, qualitative researchers may feel confident that they will "learn some important things from almost any case" and that it is appropriate to "choose one or a small number of exemplars" (p.446). Entry to the primary, secondary, and Māori immersion sectors

was considerably easy and sites responded with pride at being selected. In the ECE sector entry was not as easy due to recommendations being more often linked to identification of 'successful' individuals (PRTs or Supervising Teachers) rather than an ECE centre per se. This may have been due to the fact that funding and support for PRTs in the ECE sector is a new initiative thus centres have had less opportunity to establish a 'reputation' for successful induction of PRTs. Further, ECE centres are often located under umbrella organisations and this introduced an additional step in contacting and recruiting sites. In two of the five ECE case studies the key organisational stakeholders were involved in qualifying the recommendations for sites or referring alternative 'success' sites and teachers to us. Despite these minor limitations in the ECE sector, overall, in all sectors, the willingness of the selected sites to be involved in the research was overwhelmingly positive.

Predictably, because recruitment of sites was relatively easy, the *response rate* of participants within sites was also high across all sectors, although within the Māori medium setting some staff contacted did not wish to participate for reasons of excessive workload and school/community crises.

In terms of *rigour*, the success case sites provided multiple, extensive, data to show a range of induction practices and systems that afforded positive outcomes for PRTs, including explicit improvement outcomes for PRTs and mentor teachers (and in turn children/students although this was not the focus of the research). The research generated extensive exemplary practices as well as barriers to effective induction. The latter is important and demonstrated that this initial positive 'success' framing did not preclude identification ineffective practice (Piggot-Irvine, Aitken, Ritchie, Bruce-Ferguson & McGrath, 2009). In fact, respondents were exceptionally *open about what did not work*. As an indicator of perception of usefulness linked to the rigour of the results, the exemplars of good practice generated by the success cases are subsequently being used to inform a further, fourth phase of the induction project in which the pilot implementation of induction projects is currently occurring within the four education sectors.

Evaluation of a Development Programme for Special Education Teachers

As noted in Piggot-Irvine (2008), this evaluation was of a national school development programme that was designed to "develop teacher knowledge and share ideas on how to support learners who require significant adaptation to the curriculum content" (Ministry of Education, 2005:3). Both action research, AR, (25 schools) and action learning, AL, (24 schools) approaches to professional development were engaged in as vehicles for teachers to examine, improve and critique their own practice in a systematic, intentional, way via small scale projects guided by a researcher (for AR) or an external facilitator (for AL). Extensive background to AR and AL can be found in Piggot-Irvine and Bartlett (2008) however, in brief, both approaches are designed to involve practitioners in development projects with iterative, or cyclical, phases of gathering evidence on the existing situation, reflection on findings leading to implementation of improvements, and gathering evidence on impact of action associated with improvement.

There were three phases to the evaluation of the professional development. In the first and second phases the conduction of a large scale survey and focus groups

occurred, and the SCM was chosen as the third phase. Using a previously determined success criteria matrix, four schools were nominated by Ministry of Education contract directors and facilitators/researchers as exemplary cases in their development. Observation, interviews and documentary analysis were employed as methods of data collection for detailed examination of each case.

In terms of *entry (access to the research sites) and recruitment*, once notified, each of the selected success case schools was exceptionally receptive to being involved in the evaluation. Such ease of access contrasted strongly with that of the first two phases where, as noted in Piggot-Irvine (2008), there was difficulty gaining access to key personnel within the participating schools in order to disseminate surveys and to recruit focus group members. In these earlier phases a frequently encountered school sector resistance to involvement in research had been apparent, with workload cited as the reason for unwillingness to participate.

The *response rate* in the success case sites was exceptionally high. All four schools selected (and their facilitators/researchers) promptly and enthusiastically established processes for ensuring that documentation and respondents were available to the evaluators and there was a high level of goodwill associated with involvement. Once again, this contrasted strongly with phases one and two of the evaluation. A low response rate (30%) to the phase one survey was recorded and, in phase two, four out of the eight focus group schools were either continually hesitant or strongly resistant to contributing. Further, with the focus group schools, despite over 100 students having been indirectly impacted by the development programme, only two students were encouraged by their teachers to participate in the focus groups.

In terms of *rigour*, the success case sites provided a wealth of data to show impact of the development programme. The findings indicated that an over-riding, common, feature of the success cases that distinguished this small proportion of schools from others, was that the participant action researchers/learners utilised 'informed', or evidence-based, decision-making in their projects. The evaluators were shown data that was collected and reflected upon in the AR or AL and the ways that improvement initiatives were informed by both this data and relevant previous literature were illustrated. The success case schools could demonstrate explicit improvement outcomes for students, including increased confidence and self-efficacy, improved behaviour, enhanced achievement, better concentration and work habits, and increased inclusion by mainstream teachers and students.

These schools were also clear about how to maintain and sustain momentum from the projects, and they were particularly *open about what did not work*. There were similar themes that emerged from the comparative examination of the success case schools that both confirmed what we already know about effective development and, most importantly, the barriers to development (for detail, refer to Piggot-Irvine, 2009). Once again, this element of rigour contrasted strongly with the previous phases of the evaluation. In phase one (the survey) the low response rate restricted the employment of an intended comparative analysis of development approach (AR or AL), or school type, on the outcomes. In phases one and two also, there was a significant lack of rigorous data to support respondent anecdotal self-reporting of outcomes. It was intended that the focus groups would offer an opportunity for participants to cite evidence of outcomes but, despite requesting such evidence, little data was provided.

In summary, the variation to the SCM approach adopted generated extensive findings through the deep analysis of cases and highlighted both exemplary practices and barriers to effective development. There were no limitations associated with overly optimistic or uncritical findings. In contrast, the selection of successful cases alone revealed that rigour could be maintained alongside the benefit of ease of entry to research sites, and increased respondent willingness to contribute data.

Effective Change Leadership

Marshall's (2008) study explored the role of the tertiary middle manager as 'change leader' in successful organisational change. The aim of the research was to identify and explain the contextual factors of successful middle leadership change initiatives as a way of helping to determine the value that success focussed initiatives were capable of producing, and whether they could be leveraged to a wider constituency to assist in improved and sustained success in similar settings.

The approach employed two qualitative techniques which were variations of SCM and each addressed its own distinctive area of the research while acting as a reference and cross-check for the other. The first was a Delphi-style panel of middle leaders to identify and rank the sets of 'attributes' they perceived to be most associated with 'successful' change leadership. The second employed semi-structured interview to explore in depth the core capabilities employed by 'successful' middle leaders in organisational change. This was deemed to be a more meaningful way to measure success, where success is not always solely placed in an organisational setting and instead can apply more directly to a personal and social one (Coryn et al., 2009).

Marshall (2008) found, when *recruiting* subjects for his study, that many organisational change leaders identified with having insufficient and incomplete knowledge as to exactly what needed to be done to improve organisational effectiveness. The perceived opportunity to expand success oriented knowledge offered by this research project contributed to the overwhelming enthusiasm to participate of those approached. Those participants who were confident in their perception of their own success were more than willing to share their experiences with most of these self-selecting and volunteering participation, while those who were identified by others (managers or colleagues) as representing success were enthusiastic when approached as they saw this project as a way of sharing their knowledge and helping others.

In terms of *rigor*, the data collected in each of the phases linked to, supported, qualified, and showed the interconnected relationship between the results. Each phase was designed to exploit its potential for gaining reliable, valid, rich and insightful data that would assist in answering the aims of the research study. The findings clearly showed that although the participants may have shared similar experiences or common characteristics of organisational change, individual realities were contextually specific (Wetherell, 2003), thereby demonstrating that no two experiences were exactly alike. Both the flexibility of this research approach and the emphasis on the individual experience enabled the researcher to interpret the

similarities and differences of the personal experiences as they added to a collective understanding of 'successful' change methodologies. The SCM did not seek to learn about the 'average' or modal participant in leading change, rather it intentionally sought out the very best examples, to help determine if the methodologies being used were worthwhile, and whether it was likely that they could be leveraged to a greater number of participants (Brinkerhoff & Dressler, 2003).

Each interview participant was engaged in a unique organisational change action and each contributed his or her thoughts on being in the middle and being responsible for leading change in a candid and open way. They provided examples of the complex relationship between themselves and their client groups (peers or staff), and the change action itself which did not always focus on their success. There was an *openness* to discuss personal feelings with one participant admitting that his confidence had been knocked quite a lot and that he struggled to think that he had any value. The participants shared a wide range of practices and approaches taken which helped to minimise the potential negative impact of their various change actions. Each was genuine about their beliefs and were comfortable enough to talk about their personal approaches because they had been successful, rather than a mere checklist from the literature. The participant contributions, while varying in detail and effect, consisted of personal observations and unfolding real life stories which melded personal common sense with local meaning to form a unique local ontology which allowed for a deeper understanding of contributing success factors.

In summary, the variation to SCM provided two success oriented results that could be seen as rigorous. First, it provided in-depth stories of documented capabilities and job characteristics that were able to be disseminated to a variety of audiences involved in change management. These stories were both credible and verifiable and illustrate the actual change effect results that 'successful' middle leaders are capable of producing. Second, it provided knowledge of factors that enhance the effect of middle leaders on change results. The key factors that seem to be associated with successful applications of middle leaders as change agents were identified and compared and contrasted to those where the factors seemed to impede success.

Discussion, Conclusions, Limitations

In terms of recruitment, response and rigour there are recurring themes across the three research examples using the alternative SCM design. Recruitment was exceptionally easy in all cases, despite the three authors' previous experience of the education sector being difficult to access in research. All of the sites or individuals approached in the examples of research were generally flattered and often somewhat surprised at being identified as potential success cases and the positive framing of 'success' seemed to offer a sense of reassurance that the outcome of the research was not to highlight deficiencies or merely to uncover problems but, on the contrary to, start from a positive perspective.

Response rate from individuals in each site was also high in each of the cases discussed. It was not unusual for the researchers to receive comment from participants that their prior involvement with research had left them feeling scrutinised or having been researched 'on'. In contrast, the SCSs appeared to have

offered teachers a sense of researching 'with', almost a form of self evaluation and review alongside an external recorder and observer.

In each of the cases discussed there is considerable evidence of rigour in both the research and the findings. Explicit use of multiple, triangulated (Denzin, 1997), methods ensured that extensive data could be compared and contrasted. Further, despite any contention that the focus on just 'success' cases might limit revelation of the 'unsuccessful' features associated with practice (whether that be induction, development, or change leadership), in all of the cases extensive openness about negative issues was apparent. There was no evidence of defensive, or protective, behaviour about such issues.

An additionally outcome from the approach was impact on future implementation. The findings from the induction case study were immediately utilised in establishing a trial programme that has subsequently been piloted in NZ schools. In this way, the research focused primarily on 'success' set an agenda for future change (Brinkerhoff, 2003).

Overall, the success focussed approach intentionally sought to understand an initiative and the actions it had produced. The 'lived experiences' of the participants were explored to provide a basis for an understanding of how people think and act (Danzig, 1997). In each of the example cases the participants constructed their personal accounts of practice based on reflection (Forster, Cebis, Majteles, Mathur, Morgan & Preuss, 1999) and, we believe, that it was these personal accounts that led to deeper understandings of how expertise is gained in the real world (Hancock & Hellowell, 2003). Reflecting on these personal accounts of practice, in turn, was designed to lead to a greater understanding of professional motives and workplace practices (Hannabuss, 2000).

A perceived limitation of the results could have been that the case studies did not attempt to address Brinkerhoff's (2005) suggestion that SCM studies estimate organisational business goals such as return on investment (ROI). Given the nature of the evaluations described in our case examples, ROI would not have been the most meaningful measure of success. In each example, the definition of success required a reconceptualising of what was meaningful for each setting. Our modifications to the SCM enabled us to define success in a context which, whilst grounded in an organisational setting, did not specifically have an observable, measurable ROI. It could be said that our examples were more directly related to personal and social measures of success.

Another perceived limitation could be linked to bias of sampling. In each case described the 'success' sites or individuals were purposively chosen (Denzin & Lincoln, 2000) with an intent to clarify the deeper causes behind a given situation. According to Basse (2002) a random sample emphasising representativeness is seldom be able to produce this kind of insight and recommends that it is more appropriate to select few cases chosen for their validity. The typical or average case is often not the richest in information. Atypical or extreme cases often reveal more information on the situation being studied (Yin, 1994). It is our hope that the cases presented have achieved this.

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