

**Transitions in the SEND system:
Collective research planning through action learning**

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Introduction

If research is to have impact and engagement beyond purely academic concerns, we must find ways to bring together the interests of academic research with those of the world outside the university. In this paper, we tell the story of an attempt to develop a collectively-planned research proposal which sought to address live concerns and issues in the special educational needs and disabilities (SEND) system by setting up an action learning set. This set had the dual aim of identifying and addressing problems through action learning, and co-producing a research proposal aiming to develop more insight into these problems. By approaching collaborative research proposal development in this way, we hoped both to provide something useful for participants from their engagement in the process, and to ensure that the research proposal emerging from this would be genuinely impactful and useful, by building in from the start the expertise and knowledge of professionals immersed in the field. This was a genuine attempt to try something new. In this paper, we reflect on the pros and cons of trying out this approach.

Genesis of the project

This project emerged from an ongoing conversation between Anne Murphy, a management learning specialist with a PhD in Applied Linguistics, Karin Tusting, a linguistic ethnographer with an interest in literacy, and other colleagues interested in using similar methods to understand the workings of organizations. (Linguistic ethnography uses ethnographic tools such as participant-observation and in-depth interviews to understand the social workings of a particular context, combining these with close attention to the

detail of language and language practices and attempting to understand the insider experience of participants (Tusting, 2019).) We became particularly interested in how to understand communication across and interactions between different organizations, institutions and services. At the same time, both of us were encountering the SEND system in our personal lives and realized that this interest could potentially be brought to bear in this intensely complex, under-resourced context. In order to do this well, we felt the need to engage with people working within the system, to understand where the most useful focus for a research project might lie from their perspective.

The so-called SEND system is of course not really a single system at all, at least not in the sense of being a coherent structure of organizations guided by an overarching design. It brings together many types of organization which play different roles in supporting children, young people and families, each with their own systems, resource constraints, management and working practices, cultures and ways of communicating. This includes educational organizations like schools, colleges and local authorities; health care, including GPs, paediatric services, educational psychologists, occupational therapists, and diagnostic services both private and NHS; social care and support; voluntary and charitable organizations; and families themselves.

It is widely recognized that the SEND system has become overstretched in recent years. The reasons for this are complex, including a rise in the numbers of children and young people recognized to have additional needs, and the introduction of legislation placing legal obligations on local authorities to assess these needs and provide services to meet them (SEND Code of Practice 2015). Pressures on many of the elements of the system make these legal responsibilities difficult to fulfil. A severe shortage of educational psychologists delays assessments. NHS diagnostic services have years-long waiting lists. Local authorities, under severe financial pressures following years of austerity cuts, struggle to fulfil their statutory obligations within extreme budgetary constraints.

We decided to build on our theoretical interests in linguistic ethnography and organizations by bringing together a set of people working in different positions in the SEND system with a twofold goal. We wanted to explore whether action learning could be useful to them navigating their own ever-choppy waters, while at the same time drawing on the insights from the set discussions to build a proposal for research which might help to understand, or even address, some of the challenges faced in the SEND system.

We received a small grant from the Health Research Hub at the Faculty of Arts and Social Sciences, Lancaster University, to set up a learning intervention with relevant stakeholders. This paid for time for Anne to reach out to people in a range of roles in SEND across the region, to discuss whether they might find a learning intervention useful, and to invite them to join an action learning set. The set would have the joint goals of supporting their own learning about key challenges they were facing, and planning a research project addressing some of these challenges. An initial small group of people expressed potential interest, including the co-authors of this paper, and we set up an initial face to face meeting to explore possibilities.

First meeting: testing the ground

During that first meeting, discussion ranged widely around the challenges facing people working in SEND both locally and nationally, and the question of whether academic research could have something to offer. Some scepticism was expressed as to whether yet another research project could really provide anything useful, particularly since a national-level review of SEND had recently been completed (HM Government 2022). Nevertheless, the group was in principle interested in exploring whether action learning could provide a way for them to work together in supporting each other to identify and address key problems and issues, and in drawing on this learning to inform the development of research. Although the challenges identified were numerous and broad-ranging, some common areas of concern were identified. Chief among these was the question of transitions, i.e. what happens when children and young people move between educational settings, or from education into adult life, and what support is needed to ensure that these transitions are as successful as possible. Focusing on transitions also appealed to our theoretical interest in exploring how different organisations work together.

Action learning set meetings

After our first meeting, we organized an action learning set aiming to focus on issues related to transitions in the SEND system, with a secondary purpose of developing a research proposal informed by the discussions. Anne introduced the principles of action learning at the first meeting. After explaining the history and method of the approach, she modelled the process of bringing a problem to the group, receiving focused and constructive questions, and committing to taking action, learning from it, and bringing that learning back to the group. We agreed a series of seven online meetings running through 2024 and the spring of 2025. Other people were invited to join the group via personal

contacts and we ended up with a set of five people, plus Anne and Karin as action learning advisers.

Participants' diaries were very full, so these meetings had to be relatively short, lasting only two hours. To keep the momentum going between meetings and to ensure adequate time for each individual, online meetings were supplemented with an asynchronous approach of "action learning by email" (Abbott 2023). In the weeks between meetings, set members took turns emailing at the start of the week the current state of play of their main problem or issue. Others asked questions throughout the week, and the focal member responded at the week's end. This proved a surprisingly meaningful way of keeping the conversations going, allowing time for reflection and discussion which recognized the pressures on participants' time and allowed them to each engage as and when they were able.

Problems brought to the set

The set members brought a range of different problems to the set, which related in some way to the theme of transitions we had decided on together. These included questions around improving the engagement of potential employers; collecting data which could evaluate success from a broad perspective; introducing and using Equality Impact Assessments in an authentic way (see Leeds City Council (n.d.) for a brief explanation of these); and supporting best practice around transitions across a diverse range of settings and contexts. Each problem generated questions and discussions involving all the members of the set. A range of actions were taken, including some set members collaborating between meetings on developing documents and tools to address their concerns.

Generating a research proposal

Meanwhile, alongside discussion of members' problems, we talked about how a research project could be designed to explore the issues emerging as important. Transitions remained a central theme, particularly into adulthood from education. All our interactions were generating textual traces, in the form of notes from the online meetings, and long interwoven email threads discussing problems and actions between the meetings. At the fourth meeting, one member asked whether we could have the mass of fragmented and messy interactions organized and summarized, to see the themes which were emerging more easily.  This question led to a lightbulb moment for Karin, who realized that she could

draw on her experience in analyzing messy and complex ethnographic datasets to make sense of these textual traces of action learning.

Karin collected all the textual materials which had arisen from our discussions and carried out a systematic qualitative analysis, aiming to give coherence to what had taken place already and provide some guidance for our future direction. All the texts that had been produced, including email threads, meeting notes, and a spreadsheet summarizing a literature review on transitions, were imported into the qualitative data analysis software Atlas.ti. This software supports a researcher in going through a dataset assigning codes (meaningful, brief labels) to extracts from data and organizing these codes into categories, capturing the thinking process in written memos along the way.

After collecting and organizing the texts, Karin went through and coded them systematically, organizing the codes into a set of themes. These themes included: aims and goals; what we know already; questions brought to the group; challenges identified; factors affecting implementation of actions; actions being taken; designing the research. On the basis of this analysis, we produced a long document summarizing what had emerged. This included the key concerns people had expressed at various points about the proposed research: that it should not replicate prior work that had been done, whether from academic, policy, or practice-oriented research; that it should realistically aim towards achieving concrete improvements; and that a laser-like focus would be required to make it meaningful and likely to achieve these goals.

We have used this document as the starting point for producing a research plan. One key theme that emerged was the importance of strategic documents aiming to introduce change. We are currently developing a research proposal which will take as its starting point a document of this kind – ideally one produced by members of this group, though timeframes of funding and contracts might not make that possible – and follow through its introduction and take up, addressing the key question of what it takes to make a positive difference in the SEND system. Members of the action learning set will sit on the steering group for the research bid, which will genuinely be a collectively-generated plan emerging from and fully rooted in the action learning set discussions.

What we have learned

We have learned a lot from engaging in this process. For each of us, in different ways, it has required a certain amount of suspension of disbelief; research proposals do not

usually begin with this level of openness as to what might emerge. While essential to our purposes of balancing action learning and research design, this flexibility brought with it inherent tensions which we explore in this section.

From Karin and Anne's 'researcher' perspective, having participants fully involved in the research design from the outset brings potential benefits further down the line. Rather than the perennial problem of convincing end users of the value of research results, the action learning format allows research questions to be developed which address salient real-world problems, because these problems are precisely what participants (who are also potential end users) are invited to focus on within the action learning set. Anne and Karin genuinely did not know what might be of most value to their participants, so engaging the set in the development of the ideas helped them to stay grounded in the participants' realities.

The process also required a greater commitment from both researchers and set members than a standard research consultation process. While the researchers aimed to be transparent about this, it is difficult to live the process of developing something new without knowing what would emerge. Each member of the set began with their own set of contextual concerns which required reflection and action - but not necessarily research. While the action learning process is valuable in and of itself, it was not a given that this would lead to the development of a viable research proposal, or that we would be able to draw out a coherent plan for the next steps.

From Diane A, Diane N and Andy's 'participant' perspectives, the dual purposes of doing action learning and engaging in research planning sometimes muddled the waters. At different points and for different people there was a sense of pulling in different directions: were we designing research or improving the system? Was it possible to do both? Together we learnt that there is a tension between trying to understand what was happening in the 'system' as participants in that system know it, and the experience of the complexity, difficulties and challenges that each person faces. On one level, everyone knows what is 'wrong with the system' and many solutions have been attempted, such as implementing recommendations from the SEND review, persuading employers to engage in initiatives, or carrying out projects aimed at 'capturing young people's voices'. On another level, there is a shared recognition and concern among participants about the breakdown of trust between local authority representatives and parents and young people,

despite doing absolutely everything they can to hear and understand parents' and children's perspectives.

As Karin and Anne reflected on their learning from this work, it became apparent that the tension created by different interests and sources of expertise (of the two set advisors and of the different participants) was consequential. The researchers' assumption had been that to improve the system they should recognize that all participants have different and equal expertise and that no one is outside the system looking in. This is easier said than done. Karin and Anne realized that there was an imbalance of power inherent in the process. We were obviously leading the process, but it was our participants who had the knowledge and expertise that was needed to make it work. We needed them to become co-designers of the research, and yet we remained the generators both of the research proposal and of the action learning set. The set participants were neither clients in the traditional sense of an organizational action learning project, nor subjects in the traditional sense of being positioned in a research proposal. They were somewhere in between.

As a result, we as researchers became very aware of our legitimacy in the process Revans calls 'accouchement' - or birthing - of an action learning set. To what extent could we take the authority to intervene and ask, 'Are we really on task here?' Because after all, what is the task? Is it enquiry or is it system change? Is it research or is it practice? For Karin and Anne, this fuzziness bred a sense of impostor syndrome which at different point of the process left them feeling not 'expert enough'. The balance between the participants' expertise in SEND, Karin's expertise in linguistic ethnographic research, and Anne's expertise in working with action learning in organisations were essential for the design and development of the project but because we were all novices in this mélange it levelled the ground between us to the extent that none of us was sure that we were 'doing it right'.

In conclusion, the work highlights well documented tensions between research and practice and lends a rich description of lived experience of how this particular project played out in practice. It invites us to identify the challenges and tensions in attempting to do both. To sum up from a 'facilitator-researcher' perspective, we (Karin and Anne) are still feeling our way through, with our watchwords being listening, challenging and actively questioning each other; but this has taught us a lot about how action learning can both help people to develop in their own individual contexts, and help to develop a collective plan of action. All the participants in the project wanted to continue to be involved in the research as we move on which suggests that they have found the process valuable –

specifically what they have individually learnt, what they have been able to do together as a result, and how being connected to research might make a difference for them in their work.

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