

Navigating leadership complexities: Doing the right work, the right way

Erin Sawyer



ABSTRACT

This case study explores the complexity of leading adaptive change within a large RTL (Resource Teacher: Learning and Behaviour) cluster in Aotearoa. Centred on the dilemma of how to adapt an internal case management tool (eRTL) to strengthen best practices, the reflection draws on the principles of adaptive leadership and Robinson's (2022) collaborative problem-solving model. It highlights the interplay between context, leadership, and professional learning in navigating systemic variability and fostering coherence across a diverse team. Through deliberate attention to relationships, cultural responsiveness, and shared decision-making, the process sought to balance consistency with practitioner autonomy—honouring both professional judgement and collective responsibility. The case illustrates how strategic and virtuous leadership can support sustainable change by embedding collaborative inquiry, reflective learning, and cultural grounding into everyday practice. In doing so, it reinforces the importance of 'doing the right work the right way'—an approach that acknowledges complexity, leverages collective expertise, and places mokopuna at the centre of improvement efforts.

KEYWORDS

Adaptive leadership, collaborative problem-solving, virtuous leadership, complex systems, He Pikorua

Introduction: Context is everything: A leadership dilemma

The context

The purpose of this case study is to reflect deeply on a leadership dilemma to assess how the actions and outcomes align with best practice decision-making—'doing the right work, the right way' (Robinson, 2022). An exploration of the dilemma's context is undertaken, with a theoretical framework applied to support effective analysis.

I am a Practice Leader in a large RTL (Resource Teacher: Learning and Behaviour) cluster in Aotearoa. RTL are trained specialist teachers who work with schools and kura so they are able to

meet a broad range of learning, wellbeing, and behaviour related needs (Ministry of Education, 2025). Practice Leaders are responsible for leadership, guidance, and support of RTLB in their professional practice. I have held this role for almost three years, building on a career in educational leadership. Leadership has always been a significant interest of mine, which I am passionately involved in, continually reflecting on my leadership practices and how I support a large team to provide an effective and valued service.

Our organisation comprises almost fifty RTLB who support 83 schools in a large urban centre and outlying region. Within our larger team, we have a Kāhui Māori team of eight Pouwhirinakitanga dedicated to servicing our kura. Some of our kaimahi have been with the cluster since its inception, while approximately a third have joined in the past two years.

The dilemma

In 2019, we introduced an updated version of our online case management tool, now known as *eRTL*B (formerly *Schoolgate*). This internal platform supports RTLB in documenting, tracking, and monitoring requests for support, collaborative action plans, and outcomes across the service. It offers a structured framework for capturing key stages of casework, including the initial request, planning, implementation, review, and closure. However, as the leadership team began rolling out the updated system, the onset of COVID-19 significantly disrupted implementation plans. Initial efforts to mandate its use were postponed, and the tool faced considerable criticism—particularly around usability. Practitioners noted issues such as the need to enter the same information multiple times in different sections, raising concerns about its efficiency and practicality in everyday use. Inconsistent use of *eRTL*B also raised questions about the quality of cluster data including the outcome data.

During this period, I joined as an RTLB and saw both the potential benefits of using *eRTL*B and the frustrations felt by others. When I began in my leadership role as Practice Leader, I expressed a desire to ‘refresh’ the tool to ensure it was guided by best practices, rather than allowing the tool to dictate our practice. Fortunately, my background in working with various online platforms provided me with both technical expertise and experience in implementing large-scale technology projects, which proved invaluable in addressing this dilemma. The dilemma became: How could I facilitate the adaptation of *eRTL*B to strengthen best practices across the cluster?

Part one: Context matters

Traditional contexts

Educational contexts are often described as omnibus contexts (Shamir, 2013, cited in Robinson, 2022), which include factors like school type, socio-economic status, and location. While generalisations can be made about these contexts, it’s important to recognise that context is dynamic and unique (Robinson, 2022). Educational leaders must adapt their decision-making to the specific needs, opportunities, and constraints of their contexts (Bossert et al., 1982, cited in Hallinger, 2018). As environments become increasingly complex, a leader’s knowledge should be

more context-dependent (Tamadoni et al., 2024). Hallinger (2018) also discusses ‘person-specific contexts’, referring to the skills, knowledge, and dispositions a leader brings to their role.

Adaptive leadership

Various contextual considerations and constraints that surround this dilemma highlight the complexity of our organisation. These contexts shape and challenge how leaders leverage structures, resources, processes, and kaimahi to improve outcomes for mokopuna (Hallinger, 2018; Tamadoni, 2024). Complexity, as defined by Raei and LeMaster (2022), refers to the intricate interconnections within systems where interactions among different parts produce outcomes that are unpredictable and cannot be easily understood by examining components in isolation. Le Fevre et al. (2020) explain that problems in education are typically complex because they involve two complex phenomena: people and learning. Robinson (1993) distinguishes complex problems from complicated problems by noting that complex issues are characterised by significant initial uncertainty—uncertainty about which information is relevant and what might be an effective solution. In complex systems, uncertainty is inherent (Le Fevre et al., 2020), making the ability to work with ambiguity, and helping others to do the same, crucial leadership skills. Ambiguity, as defined by Le Fevre (2022), arises during crises or challenges where leaders encounter unclear information or outcomes, leading to multiple possible interpretations and actions without a definitive answer.

To navigate the uncertainty, ambiguity, and complexity within our organisation, we should focus on adaptive leadership practices that emphasise flexibility, collaboration, and reflective learning. This enables us to align resources, structures, and processes with the evolving needs of mokopuna (Heifetz et al., 2009; Le Fevre et al., 2020). Adaptive expertise, at its essence, is about responding to complex educational problems in ways that promote improvement and equity in education (Le Fevre et al., 2020). Adaptive leadership responds effectively to complex and shifting challenges by fostering collaboration, learning, and resilience. Unlike traditional leadership approaches, adaptive leadership recognises the unpredictable nature of complex systems and focuses on navigating uncertainty (Heifetz et al., 2009). This approach involves guiding teams through ambiguity, engaging diverse perspectives, and empowering stakeholders to co-create innovative solutions for evolving problems (Le Fevre et al., 2020; Robinson, 1993). A key tenet of adaptive leadership is accepting that there is not always a single right answer, which is essential for leading effectively in complex situations (Le Fevre et al., 2020).

The interplay between context and adaptive leadership highlights the need for leaders to be flexible and responsive to both systemic factors and person-specific dynamics. Traditional contexts like school type and socio-economic status provide a foundation, but as Robinson (2022) and Hallinger (2018) suggest, leaders must navigate shifting, dynamic contexts. Adaptive leadership, as defined by Heifetz et al. (2009), emphasises flexibility, collaboration, and reflective learning in addressing unpredictable, context-specific challenges. By leveraging a deep understanding of their environment, leaders align strategies with evolving needs while building adaptive expertise for sustained improvement (Tamadoni et al., 2024; Timperley, 2011).

Part two: Theoretical approach/framework for working through a leadership dilemma

Revisiting the dilemma

In exploring methodologies for addressing leadership dilemmas, it's important to consider both traditional and contemporary approaches. Robinson's (1993) problem-based methodology offers a structured, linear approach progressing through well-defined stages: defining the problem, investigating its causes, generating and evaluating solutions, implementing chosen strategies, and evaluating outcomes. This methodology can be effective for clearly defined problems within educational settings, providing a systematic framework for problem resolution.

However, given the complex and dynamic nature of the challenges faced in our organisation, Robinson's (2022) collaborative complex problem-solving model proves to be particularly apt. Unlike the linear approach of the problem-based methodology, this model emphasises collaboration and adaptability, which are crucial for navigating the complexities and evolving issues within our organisation.

The five stages of Robinson's collaborative model—problem identification, diagnosis, design, implementation, and evaluation—are characterised by ongoing communication, flexibility, and reflective learning. This approach aligns more closely with adaptive leadership principles, which stress the importance of collaboration and responsiveness in addressing complex problems.

This iterative process reflects the core values of He Pikorua (Ministry of Education, 2020), particularly the emphasis on mana-enhancing relationships, collaboration, and cultural responsiveness. Like Robinson's (2022) collaborative problem-solving model, He Pikorua in Action foregrounds the importance of shared understanding and collective sense-making, which aligns with adaptive leadership's emphasis on navigating complexity through partnership and reflection. Each stage of Robinson's model—problem identification, diagnosis, design, implementation, and evaluation—requires practitioners to remain attuned to the voices and contexts of those they support. This mirrors the He Pikorua in Action process designed to promote collaborative relationships and commitment to whanaungatanga and ako, where learning is reciprocal, and decision-making is informed by both professional expertise and the lived experiences of ākonga, whānau, and educators.

Given the dilemma of facilitating the adaptation of eRTL to strengthen best practices in line with He Pikorua across the cluster, Robinson's (2022) collaborative model is a strategic choice. This model supports the iterative and collaborative efforts required for the 'Refresh Project,' allowing for effective engagement with kaimahi and continuous refinement of solutions. It recognises that in complex educational environments, problems often evolve as they are being addressed, requiring a more flexible and inclusive approach than a strictly linear methodology.

Stage 1: Agree on the problem to be solved

Our annual satisfaction survey, distributed to all schools in our cluster, revealed variability in RTLB practices, highlighting the need for a more coherent and consistent approach. In our cluster, strategic planning plays a critical role in identifying trends and shaping collective goals in line with the service priorities set by the Ministry of Education in the funding agreement. Each year, the entire team engages in a rigorous, collaborative process to reflect on data, share ideas, and develop strategic priorities. Every RTLB has the opportunity to contribute their thinking—offering goals, actions, and insights. Importantly, every word in the final plan must be agreed upon by all team members. While this process takes significant time, it ensures that the resulting strategy is one of genuine shared ownership. The strategic plan is more than a document—it directly informs budget decisions, professional development priorities, and the direction of our work as a cluster. Through this process, the variabilities raised in the survey were explored in depth, and a shared goal emerged: to strengthen consistency of documentation, scope of practice and processes. Engaging the team in consultation not only clarified the problem but also fostered collective responsibility for the solution, echoing the leadership principle that consultation builds ownership and trust (MacBeath & MacDonald, 2000).

Robinson (2022) emphasises the importance of clearly identifying the gap between current and desired practice, which we demonstrated through examples of inconsistent documentation compared to a standardised model. Addressing these inconsistencies reflects leadership virtues of integrity and respect by openly addressing the issue and considering diverse perspectives (Robinson, 2022).

Le Fevre et al. (2020) caution against rushing to solutions, stressing the need for careful analysis. Instead of a quick technological fix, we chose a more sustainable approach. This decision aligns with strategic leadership, where complex problems require thoughtful solutions (Heifetz et al., 2009). We remained focused on the core question: “Does adapting eRTLB directly enhance outcomes for mokopuna in our cluster?” (Le Fevre et al., 2020). This careful and collaborative process exemplifies virtuous leadership by integrating strategic focus, respect, and integrity throughout (Robinson, 2022).

Stage 2: Inquire into causes

Historically, our RTLB cluster prioritised practitioner autonomy, offering individuals considerable flexibility in how they recorded and shared their work. This approach enabled personalised, context-responsive practice and honoured professional judgement. However, in the absence of shared expectations or consistent frameworks, this flexibility also contributed to the variability in documentation we now face.

While this approach may have honoured practitioner autonomy, it also limited opportunities for collective learning and shared accountability. Given the highly variable nature of our work, strict guidelines often fall short—they can feel too rigid to accommodate the complexity and responsiveness our roles demand. However, the absence of clear frameworks can also lead to ambiguity, inequity in service delivery, and challenges inducting new staff. Without shared processes or language, collaboration can be compromised, and it becomes harder to evaluate effectiveness or

scale best practice. In striving to honour individual professional judgement, the system unintentionally weakened coherence, making it difficult to adapt collectively when challenges arise.

In response to these tensions, He Pikorua, a new practice framework, was introduced nationally (Ministry of Education, 2020), focusing on principles to guide decision-making rather than rigid tasks. It includes He Pikorua in Action to guide collaborative processes and Te Tūāpapa, an evidence-informed approach to identifying supports which increase in intensity, depending on the needs and the context. A principles-based approach fosters comfort in uncertainty and supports the ability to tolerate ambiguity through reflective questioning (Timperley & Twyford, 2022).

In hindsight, we may not have dedicated enough time to thoroughly investigate this stage. Much of our inquiry simply acknowledged it as a legacy issue. Robinson (2022) advises that deeper data collection and analysis during this phase could have provided more clarity before moving forward. This reflection highlights the importance of virtuous leadership—especially analytic virtues—where careful diagnosis and thoughtful consideration are crucial before determining solutions (Robinson, 2022).

Stage 3: Formulate solution requirements

Recognising that successful implementation depended on maximising ownership from the wider cluster, we engaged the team in collaborative problem-solving (Timperley & Twyford, 2022). Robinson (2022) underscores that collaborative solution formation enhances collective responsibility, a concept echoed in Timperley and Twyford's (2022) idea of 'collective agency or efficacy'. From the outset, we emphasised that we wanted everyone to see themselves in the work, ensuring deep involvement in the creation, implementation, and use of the tool. This approach aligns with Robinson's (2022) view that virtuous leadership influences others toward collective success rather than individual achievement, fostering shared responsibility.

We invited the entire cluster to participate in a team to drive this work forward. Over the next two to three years, around 80% of our RTLB engaged with this mahi at various times. This voluntary and inclusive approach exemplifies Robinson's (2022) principle that virtuous leaders create conditions that enable others to contribute effectively, aligning with the strategic virtue of fostering collective responsibility. Our commitment to te ao Māori approaches provided a strong foundation for this process. Grounded in values such as manaakitanga, kotahitanga, and whanaungatanga, we prioritised relationships, reciprocity, and unity throughout the journey. We drew on collective decision-making practices that emphasised listening, reflection, and consensus—ensuring that people felt heard and seen. This culturally grounded way of working strengthened our sense of shared purpose and honouring of mana motuhake—each RTLB's autonomy within a collective endeavour. As a result, the mahi was not only widely supported, but deeply owned.

Our initial task was to envision what could be possible without constraints, promoting innovative thinking. While Nickles (1981, cited in Robinson, 2022) suggests that constraints can help narrow down solutions, we felt that starting without limitations might encourage more creative ideas. Once we began testing these ideas, we introduced constraints to refine our focus and manage practical requirements, such as timeframes, costs, and adherence to ethical and government standards,

including ‘The Code of Professional Responsibility’ (Education Council, 2017). This process reflects the imaginative virtues Robinson (2022) highlights, as we sought to integrate diverse ideas and possibilities before imposing limitations to enhance practical feasibility.

In the subsequent phase, we reviewed various templates used throughout the history of the organisation. Heifetz et al. (2009) recommend preserving essential elements of an organisation’s heritage while adapting to new challenges. They emphasise that “successful adaptive changes build on the past rather than jettison it” (Heifetz et al., 2009, p. 21). As in nature, a successful adaptation enables an organisation or community to take the best from its traditions, identity, and history into the future (Heifetz et al., 2009). Acknowledging and incorporating what had previously worked was crucial to our project, aligning with Robinson’s (2022) emphasis on building adaptive strategies that respect and integrate past successes.

Another key decision we made at this stage was to honour our commitment to *te reo Māori me ōna tikanga* by retaining the original *te reo Māori* terms to describe the practice framework—*whakawhanaungatanga*, *kohikohi*, *tātaritanga*, and *mana motuhake*—without translation. This intentional choice reflected not only respect for *te reo Māori* as a *taonga*, but also an effort to uphold and centre Māori ways of being, knowing, and doing within our professional practice (Mika & Stewart, 2017). Embedding these terms without dilution (despite some colleagues finding this concept challenging) helped affirm *te ao Māori* as a legitimate and valued world view in our work, reinforcing our shared responsibility to honour *Te Tiriti o Waitangi* in meaningful and everyday ways.

As we transitioned from design to implementation, we faced a fundamental challenge: balancing consistent, rule-bound procedures with the need for professional discretion. This tension reflects Robinson’s (2022) emphasis on the complexity of educational leadership dilemmas. On one hand, standardising practices through eRTLB aimed to reduce variability and ensure a baseline of quality across the cluster, aligning with Hallinger’s (2018) description of institutional context shaping leadership practices. On the other hand, the highly variable nature of our work demands professional discretion, requiring tailored approaches for each unique case.

Our solution involved developing guiding questions or reflective prompts to support RTLBs in considering principles (*He Pikorua*) rather than rigid tasks. This approach aligns with Heifetz et al.’s (2009) concept of adaptive leadership – creating a framework that allows flexibility within a structured system.

Balancing rule-bound procedures with professional discretion underscored the complexity of leadership in educational contexts. It highlighted Robinson’s (2022) point that virtuous leadership involves not just following rules but exercising judgement on their application. Our approach aimed to provide enough structure to ensure consistency while preserving the necessary flexibility for individualised support. This balance demonstrates an understanding of nuanced decision-making in educational leadership, translating theoretical understanding into practical solutions. It aligns with Robinson’s (2022) concept of virtuous leadership, where leaders navigate complex situations using established procedures and professional judgement to achieve the best outcomes. With this balance

in mind, we proceeded with our solution strategies, maintaining focus on both structure and flexibility.

Stage 4: Implement and monitor solution strategies

Acknowledging that “organisational adaptation occurs through experimentation”, we planned for opportunities to experiment throughout the testing and implementation process (Heifetz et al., 2009, p. 21). Robinson (2022) suggests that successful implementations and monitoring should be conducted through a progressively revised action plan. Reflecting Robinson’s (2022) view on virtuous leadership, we recognised the importance of ongoing collaboration and feedback to ensure the solution met practical needs and supported effective practice. Robinson and Lai (2006) highlight that feedback loops can provide valuable insights into what works and why, as well as reveal both intended and unintended consequences. Regular feedback sessions were implemented to refine the tool continuously, which proved essential for addressing emerging issues and ensuring alignment with team needs.

Mitigating power dynamics into leadership practices was essential in the eRTL project. Hoerr (2005) emphasises that power in leadership is shaped by perceptions and responses. I had to balance expert power with relational trust, ensuring that power was seen as credible and aligned with team goals. This reflection on power dynamics reinforced my commitment to adaptive leadership, fostering a collaborative environment where power was shared. This approach helped navigate the complexities of the eRTL adaptation effectively, ensuring solutions were both technically sound and embraced by the team.

We provided (and continue to provide) numerous opportunities for authentic feedback, understanding that this process might generate some loss and discomfort for participants. In line with Heifetz et al. (2009), we carefully considered how to support our team by acknowledging their losses and addressing any defensive responses. This approach resonates with Robinson’s (2022) emphasis on the virtues of empathy and courage in leadership—leaders must be attuned to the concerns of their team and handle their reactions thoughtfully. Heifetz et al. (2009) also remind us that significant change often results from incremental adaptations over time, which supports Robinson’s (2022) view that virtuous leadership involves perseverance and strategic focus.

Additionally, as Heifetz et al. (2009) note, adaptive change requires not only experimenting with new strategies but also modifying the stories we tell ourselves and others about what we believe in, stand for, and represent. Through support and encouragement, team members reframed their perspectives and aligned their narratives with the project’s objectives, and we facilitated a more cohesive approach to problem-solving. This aligns with Robinson’s (2022) assertion that virtuous leadership involves guiding teams through the challenges of redefining shared values and norms in a way that honours their traditions while enabling growth.

Furthermore, Le Fevre (2022) asserts that effective leadership requires leaders to connect with and address the concerns of those impacted by challenges, aligning with Robinson’s (2022) focus on relational and strategic virtues in leadership. By embedding relational trust into our process and focusing on strategic feedback loops, we not only improved the implementation process but also

fostered a culture of continuous learning and adaptation within the organisation. This comprehensive approach ensured that the solution was not only effective in the short term but also sustainable and scalable for future challenges.

Stage 5: Evaluate impact

We are just beginning to evaluate the impact of our refresh project now, though anecdotally, the feedback has been overwhelmingly positive. RTLB have reported that expectations around documentation and case tracking are now clearer and more consistent, which in turn has made collaboration with schools and whānau more streamlined. More importantly, there are early signs that these changes are benefiting mokopuna. For example, RTLB have noted improved clarity and follow-through in collaborative action plans and that they are able to spend more time working *kanohi ki te kanohi* rather than focusing on administrative tasks. These shifts suggest that the refresh is beginning to address the core tensions that prompted the work—though some variability remains. Robinson (2022) insists that problem-solving should continue until the original goal is achieved. While it might be tempting to assume that the effective adaptation of the tool indicates that the problem has been solved, it is crucial to return to the original dilemma: “How could I facilitate the adaptation of eRTLB to strengthen best practice across the cluster?” Our true measure of success lies in the enhancement of ‘best practice’. MacBeath and MacDonald (2000) suggest that, alongside professional standards, the development of professional knowledge through collaboration is essential, as teachers work together and share their expertise.

We are beginning to see the impact of the implementation in practice, but this has also highlighted continued variability in our practice. We are now considering a new dilemma: What is our understanding of best practice in the cluster, and how might this positively impact outcomes for mokopuna? Le Fevre et al. (2020) remind us that to successfully enhance our organisation, we must place students at the forefront of all improvement efforts, with a particular focus on those whose needs are not well addressed by current educational practices. Robinson’s (2022) emphasis on ongoing problem-solving and the development of a virtuous leadership approach reinforces the need to continually assess and adapt our strategies to achieve our educational goals effectively. We will conduct ongoing evaluations through surveys and focus groups to assess the long-term impact of the refresh project on reducing variability and enhancing best practices and examine other data such as annual satisfaction survey feedback.

Conclusion: Doing the right work, the right way: Context is everything

In navigating complex dilemmas, such as our journey to adapt eRTLB and standardise best practices across our cluster, the principle of ‘doing the right work, the right way’ is foundational (Robinson, 2022). This approach underscores that effective leadership involves not only identifying the correct goals but also executing strategies in ways that are contextually appropriate, ethically grounded, and collaborative. The success of our refresh project hinges on understanding that the ‘right work’ is determined by aligning our practices with the diverse needs of our schools and the mokopuna they

serve, while the 'right way' involves processes that are inclusive, adaptive, and responsive to shifting challenges as guided by He Pikorua.

Creating a supportive organisational culture that promotes the ongoing learning and development of kaimahi can significantly enhance their commitment and willingness to exceed expectations. This is achieved by building trust among educators, fostering openness, and involving them in decision-making processes (Tamadoni et al., 2024).

Adaptive leadership principles, as discussed by Heifetz et al. (2009), are integral in addressing the complexities of this dilemma. By focusing on flexibility, collaboration, and reflective learning, we ensure that our strategies remain responsive to the evolving needs of our educational environment. Understanding and leveraging the diverse contexts—historical, socio-cultural, and political—shapes how we adapt and implement our solutions (Hallinger, 2018). Additionally, facilitators and leaders must be attuned to both the emotional and cognitive aspects of working with uncertainty and responding effectively (Le Fevre et al., 2020). Understanding these dimensions is crucial for navigating the complexities we face and ensuring that our strategies are not only practical but also empathetic and supportive of all stakeholders involved. Adaptive leadership encourages us to navigate uncertainty and ambiguity by fostering a culture of shared responsibility and continuous improvement.

Through the application of Robinson's (2022) collaborative problem-solving model and the principles of adaptive leadership, we have learned that the effectiveness of any solution depends on our ability to engage deeply with the context and to continuously refine our practices. This reflection reinforces that in complex systems, rigid, one-size-fits-all solutions rarely work. Instead, our ability to integrate feedback, reflect deeply, and adapt strategies dynamically ensures that we not only address surface-level inconsistencies but also cultivate a culture of ongoing learning and improvement.

Moving forward, we will continue to refine our practices based on feedback and evolving needs to ensure that our approach remains responsive and effective. Our focus remains on understanding and defining what 'best practice' truly means within our unique context. By prioritising collaboration, adaptive learning, and a commitment to doing the right work the right way, we aim to foster an environment where our practices align more closely with the needs of mokopuna and the aspirations of our wider educational community and so contribute to the government priorities to improve student achievement through stronger learning support.

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AUTHOR PROFILE



Erin Sawyer

Erin Sawyer is a relational and purpose-led education leader with over 20 years of experience across primary, secondary, and specialist education settings in Aotearoa. She currently serves as a Practice Leader within a large RTLB (Resource Teacher: Learning and Behaviour) cluster, where she leads strategic change, builds team capability, and fosters inclusive, culturally responsive practice. Erin holds a Master's degree in Specialist Teaching (Learning and Behaviour), with a focus on leadership and change, and has a strong interest in adaptive leadership, collaborative problem-solving, and professional learning systems that support equity and excellence. Her leadership approach is grounded in reflection, te ao Māori values, and a commitment to continuous improvement that places mokopuna at the centre of decision-making.

Email: erinjsawyer@gmail.com