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Raising attainment in the Scottish secondary school: A theoretical exploration of the influence of Scottish education policy on the practices of the Curricular Principal Teacher in raising attainment.

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Declaration of authenticity and author's rights

This thesis is the result of the author's original research. It has been composed by the author and has not been previously submitted for examination that has led to the award of a degree.

Signed 

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Finally, I would like to dedicate this thesis to:

James Rogerson Martin 1940-2003 (former University of Glasgow student)

Look what I did Dad!

Abstract

In the past 30 years, the role of the school middle leader in general has changed from a largely administrative role to one which requires further skills, such as leading and mobilising teachers to improve the outcomes for learners, evaluating evidence of outcomes and practices, and developing strategies to lead change.

Rather than investigating the complexities of current middle leadership, it has been argued that middle leadership research has tended to focus on descriptions of various roles a school middle leader undertakes within their position in schools. It has now been recognised that there is a need for a more theoretical approach to understanding the more complex role of the school middle leader. This thesis responds to that call and explores the practices of school middle leaders through the lens of Cultural Historical Activity Theory (CHAT).

This thesis demonstrates the crucial role of middle leadership positioned within education policy and explores the practices of the Scottish secondary school Curricular Principal Teacher (CPT) in raising attainment using the CHAT framework. This is achieved by illustrating the Scottish Government's National Improvement Framework (NIF) policy and the CPT as an interconnected network that shares the NIF policy objective of closing the attainment gap.

Critical policy analysis, based on the methodology of Young and Diem (2017), was used to explore how the National Improvement Framework policy has evolved over time. An online survey explored how confident CPTs were in recognising their practices as defined by the Standards for Middle Leadership devised by the General Teaching Council for Scotland (GTCS) and a semi-structured interview was used to discuss the practices of the CPTs in enacting the NIF policy objective of raising attainment.

The thesis offers recommendations for the requirement for school middle leadership to formally engage with the General Teaching Council for Scotland Standards for Middle Leadership, the potential for a recognised middle leadership qualification for aspiring classroom teachers, and for the middle leadership role to be more explicitly positioned within education policy text. Furthermore, it demonstrates that CHAT theory, potentially in conjunction with other practice theories, has the potential to investigate further social networks evident within education systems.

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List of abbreviations

CfE	Curriculum for Excellence
CHAT	Cultural Historical Activity Theory
CPA	Critical Policy Analysis
CPT	Curricular Principal Teacher
DYW	Developing the Young Workforce
EdD	Doctor of Education
ELC	Early Learning and Childcare
GTCS	General Teaching Council for Scotland
HMIE	His Majesty's Inspectorate of Education
ICEA	International Council of Education Advisors
NEET	Young people not in education, employment or training
NIF	National Improvement Framework
OECD	Organisation for Economic Co-operation and Development
PEF	Pupil Equity Fund
PRD	Professional Review and Development
SAC	Scottish Attainment Challenge
SIMD	Scottish Index of Multiple Deprivation
SLT	Senior Leadership Team
SNP	Scottish National Party
SNSA	Scottish National Standardised Assessments
SQA	Scottish Qualifications Authority
UNCRC	UN Convention on the Rights of the Child
2ndGEN	Second Generation CHAT activity system
3rdGEN	Third Generation CHAT activity system

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Chapter 1 Research Aims, Structure and Background

1.1 Introduction to the study

The importance of middle leadership has long been recognised in the education setting (Grootenboer et al 2023). This increased importance has arisen through the responsibility of middle leaders for school improvement in areas such as academic outcomes for pupils and to influence the performance of classroom teachers (Harris et al 2019). This has additionally led to a high level of devolved accountability (Highfield & Rubie-Davies 2022).

Criticism of previous research includes that it only adds to understanding the role and responsibilities undertaken by the middle leader in secondary schools, rather than the impact the role plays in achieving school priorities (Harris et al 2019). In addition, research, it has been argued, has also tended to be unsophisticated, lack an empirical approach, and not contain sufficient theory (De Nobile 2018). Research which takes a more empirical and theoretical approach to middle leadership allowing for a 'deeper, validated and contested vantage point' has now been called for (Harris et al 2019, p. 271).

Building on previous research which has presented models of middle leadership (Gurr & Drysdale 2013, De Nobile 2018), the aim of this research was to discover if the Curricular Principal Teacher (CPT), responsible for the subject department, could be positioned within the Scottish Government's flagship policy, the National Improvement Framework (NIF).

As a theoretical framework, Cultural Historical Activity Theory (CHAT) was applied to explore the practices of the Curricular Principal Teacher (CPT) in their enactment of the specific NIF policy objective of raising attainment, a

policy objective seen as crucial by the Scottish Government as the solution to closing the poverty-related attainment gap in Scotland (Kintrea 2020).

CHAT allows for the exploration of human activity within complex activity systems in addition to the historical and cultural tensions which exist between activity systems (Berg et al 2016). A CHAT theoretical framework also allows for 'useful knowledge' to be discovered rather than any attempt to discover 'the truth' (Postholm 2015, p. 54).

Two research question have framed the study:

1. Where and how is the CPT *positioned* in Scottish education policy?
2. How can CHAT analysis *explain* the *influence* of the policy of raising attainment on the *practices* of the CPT?

These questions have arisen to understand how the connection between school middle leadership and Scottish education policy is constructed and how Scottish education policy objectives are enacted through the CPT and into the classroom.

1.2 My Background

As a teacher of 27 years, with 22 years as a Curricular Principal Teacher, in Scottish secondary schools, I have lived, taught, managed and led the changing role of middle leadership. I have witnessed how it has become more complex over time, particularly in terms of the evolving role of leadership. This is in addition to the ever-present need to manage the necessary administrative function associated with any large organisation. The change in focus of education in Scotland since devolution, particularly through the SNP government's focus on closing the poverty gap over the last 15 years, has added to a clear focus on accountability to achieve measurable outcomes of education policy, which is something of which I am only too aware.

Throughout my reading for the EdD, I have witnessed the changes acknowledged in previous research first-hand and I would agree with research that the middle leadership role continues to be barely understood

(De Nobile 2018, Harris et al 2019). The middle leadership role that the Curricular Principal Teacher plays in Scottish secondary schools, while defined by a series of standards developed by the General Teaching Council for Scotland (GTCS), is little understood in terms of how this increasingly complex and crucial role drives forward school improvement while attempting to raise academic attainment in Scotland, which is recognised as necessary to compete in the global economy (Kintrea 2020).

As a CPT, I am curious to discover how integral this middle leadership role is in driving forward education policy which aspires to improve the life chances of young people. Additionally, I look to see if this middle leadership role is important and complex enough to be represented within a theoretical framework and how can the CPT be located and positioned within Scottish education policy, despite the lack of any explicit reference to middle leadership in Scottish education policy texts.

1.3 Thesis Structure

Chapter 1 introduces the rationale, the aim of this thesis and my background as a practising CPT.

Chapter 2 is a literature review which explores how school improvement emerged from the 1940s, how the role of the middle leader has developed against the backdrop of a globalised education policy imperative of school improvement, and what the middle leadership role is in the Scottish context of the CPT in raising attainment. Thereafter, a range of possible theoretical frameworks are considered which could potentially be applied to the middle leadership role of the CPT.

Chapter 3 considers the methodological approach to this research. It is seated in a constructivist paradigm, a relativist ontology, and an interpretivist epistemology. The methodology of critical policy analysis used to analyse the NIF policy, the online survey, and interviews are explained. The way coding was applied and other themes are also considered.

Chapter 4 examines the NIF policy and how the policy evolved from the 2016 to the 2022 version. The policy is then presented as a 2ndGEN CHAT activity system and the implications discussed.

Chapter 5 discusses the online survey which used the General Teaching Council for Scotland (GTCS) Middle leadership self-evaluation statements to investigate the confidence of CPTs in understanding their *position* within education policy. The specific roles of management and leadership are identified in the GTCS Standards for Middle Leadership and discussed.

Chapter 6 further considers the management and leadership roles of the CPT explored during the interview stage. The interview process is discussed and the interview results are presented. The *practices* of the CPT are then presented as a 2ndGEN CHAT activity and the implications are discussed.

Chapter 7 discusses the overarching themes which developed as a result of the research findings from the critical policy analysis, online survey and interviews.

Chapter 8 presents the 2nd GEN activity systems of the NIF policy and the practices of the CPT as a networked 3rdGEN activity system demonstrating the *position* of the CPT in education policy and *practices* of the CPT in raising attainment. The implications of mediated actions, power and the *position* of the CPT in the NIF policy are considered.

Chapter 9 concludes the thesis by presenting a theoretical approach to middle leadership and the position of the CPT in Scottish education policy. Contributions to knowledge and the limitations of the research are presented. Recommendations based on the thesis findings are suggested in addition to a reflection of the personal and professional impact of the EdD process.

Chapter 2 Literature Review - The CPT in Context

2.1 Introduction to Chapter 2

This literature review explores the range of factors which have influenced the research questions, beginning with defining the role of the middle leader in secondary schools from that of an administrator to a role which includes a leadership function located within the emergence of the global initiative of governments to improve schools (MacBeath 2008).

In the Scottish context, it explores how the Curricular Principal Teacher (CPT) as the middle leader responsible for curricular departments emerged through a radical change to the structure of Scottish schools in 2001 (Scottish Government 2001). In addition, it also explores how the global imperative of school improvement has been recognised and addressed within Scottish education policy and how the success of Scottish education policy is measured. The way education policy is enacted in schools by teachers is also explored.

In order to undertake the call for a more theoretical understanding of middle leadership (De Nobile 2018, Harris et al 2019) an exploration of possible theoretical frameworks was carried out to support the choice of theoretical frameworks used in this study to study the practices of the Scottish Secondary school middle leadership post of the CPT.

2.2 The Evolution of Middle Leadership

The role of the middle leader has changed over time from that of an administrative managerial role responsible for departmental timetables, resources, staff, gathering data and planning, and delivering the curriculum to a role which includes leadership tasks such as developing strategic vision distributing leadership, or motivating teachers (Bennett et al 2007, De Nobile & Ridden 2014). Highfield & Ruby-Davies (2022) highlight further how middle

leaders not only motivate staff but also make decisions in order to influence the practices of teachers to improve outcomes for pupils.

In essence, the middle leader encapsulates the roles of leadership, management and administration. As a leader, their purpose is multi-faceted: Leithwood (2009, p. 109) describes factors such as "setting directions, developing people, redesigning the organisation and managing teaching and learning". Further, Bush (2008) asserts that the true purpose of school leadership is a concern with the how, why and what of learning. Burgoyne et al (2007) define leadership as the visionary and creative aspects of organising and management as the operation of routines.

In terms of defining roles, Gray (1972) contends that the management role in education focusses on principles and strategies while the administration role is concerned with the routine processes necessary to fulfil the management function. De Nobile & Ridden (2014), in defining middle leadership key roles leadership and management, additionally define the administrative role as organising systems, resources and putting procedures in place which allow staff to undertake tasks.

The array of roles and responsibilities within leading, managing and administrating mean that efforts to define middle leadership are tricky. Leithwood (2016) makes the distinction between secondary school principals with a strategic school agenda and department heads who have a greater influence on student performance. Gurr & Drysdale (2013, p. 56) posit that 'defining middle leadership is not simple' really depends upon the structure of the school. Grootenboer et al (2023) argue that while other leadership posts exist in schools, such as deputes or assistant principals, only those leadership posts with a teaching commitment should be defined as middle leaders.

The role of the middle leader also involves a high level of accountability to school senior management who have overall responsibility for implementing school improvement. This new accountability arose from changing UK

government policy in the 1990s which sought improvement in schools through raising academic attainment, in order to be competitive on the global economic stage with other highly performing countries (MacBeath 2008, Kintrea 2020). Schools subsequently became the subject of league tables based on academic attainment data leading to raised levels of local authority accountability communicated through the hierarchy of local government education to school leaders, and further still to middle leaders who were tasked with raising academic attainment at a classroom level (Currie et al 2009).

The significant shift to role of the school middle leader however resulted in leaders of curricular departments who were poorly prepared for this new leadership role. Brown et al (2000, p. 239), in their study of 'Heads of Department', recognised the middle leadership role as 'key in developing successful schools', concluding that there was a need for further research into the practices of middle leadership in order to provide training and development which would capitalise on the potential of middle leaders to produce school improvements.

In their influential study which explored this new role of middle leadership, Bennett et al (2003) discovered a perceived reluctance by middle leaders to undertake role with added responsibilities for vision, collegiality and monitoring teaching quality, and concluded that there was little empirical evidence of any professional development for the middle leader role or of any influence these leaders had on learning and teaching within their departments. Bennett et al (2003) also concluded that middle leaders appeared unresponsive to the changing government policy demands on schools and were reluctant to get involved in the whole school agenda.

In revisiting their earlier research in 2007, Bennett et al concluded that little about the role of the middle leader had changed from that of an administrator, a point also noted by Harris et al (2019). They argued that the middle leadership role could be better understood through a school structure and agency dualism. This dualism would not lead to a change in the role of

the middle leader, but school structural changes decided by senior leadership would demand change in the role of the middle leader. However, it would not necessarily lead to the agency required from senior leadership to allow departmental middle leaders to operate in a leadership role (Bennett et al 2007).

More recently, Gurr & Drysdale (2013) presented a discussion on the impact of school middle leadership which focussed less on the administrative role, which still existed, to an exploration of other middle leadership responsibilities such as managing learning and teaching, interventions to improve pupil achievement, and staff development. They concluded that there was the potential for the middle leadership role to have influence in these areas, but its importance was somewhat unrecognised.

The complexity of the middle leadership role was however recognised by Bassett (2016), who highlighted a lack of confidence and training particularly in aspects of the role such as developing interpersonal skills and the ability to mediate between classroom teachers and senior school leaders. As such, the lack of training recognise by Bassett (2016) supports the view previously of Gurr & Drysdale (2013) who recognised the lack of importance placed on the potential influence that the middle leader would have in their leadership capacity.

Further research has sought to explore and define the changing role of the middle leader from an administrator to that of a middle leader with a wide range of responsibilities geared towards achieving whole school objectives (De Nobile & Ridden 2014, Bento et al 2023). Harris & Jones (2017, p. 214) define middle leaders as those who carry out a ‘pivotal role’ in influencing the practices of classroom teachers, which in turn, they argue, leads to improvements in the pupil outcomes. De Nobile (2021), in his literature review, describes the middle leader as having twofold responsibilities, positioned between the classroom teacher and senior management and with the ability to influence whole school policy. De Nobile (2021) then provides an interesting and comprehensive list of inputs to the various roles

performed by middle leaders such as knowledge of the curriculum, attainment strategies, knowledge of political policies, and the professional development of staff, all while still fulfilling the traditional role of the administrator.

In recognising this changing middle leadership role, De Nobile (2021) also offers a model of middle leadership through categorising of a range of middle management roles defined as inputs and outputs which he sees as crucial to the middle leadership role. Here, De Nobile (2021) attempts to theorise the middle leader role by concentrating on and specifically exploring the processes that occur between these inputs and the outputs. In essence, he is asking, how does middle leadership work? De Nobile (2021) does not implement the model, instead offering it to other researchers as a possible empirical test which could potentially lead to further middle leadership research.

The model suggested De Nobile (2021) is not covering new ground. Previously, Gurr & Drysdale (2013) also offered a model of the middle leader, concentrating again on a list of inputs similar to those of De Nobile (2021) such as curriculum, staffing and the student experience. They concluded that as well as these responsibilities, attention should also be paid to 'personal qualities and skills' to improve the practices of the middle leader (Gurr & Drysdale 2013, p. 67).

Despite attempts to develop models to explain middle leadership, it is Grootenboer (2018, p. 294) who makes the first foray into a possible theoretical approach to middle leadership. He argues that attention should focus on 'the development of middle leading practices' through an understanding and implementation of a theory of practice and 'architectures' which identifies the conditions that may or may not enable the middle leader to perform their role effectively. However, Grootenboer later concludes that the pressures of managerial tasks can have an impact on their ability to focus on educational practices (Grootenboer et al 2023).

In their comprehensive literature review of the state of middle leadership research, Harris et al (2019), return to the subject of the lack of research and the potential for a theoretical lens. They conclude that research remains low and tends to continue to focus on roles and responsibilities, while also questioning the current depth of knowledge of middle leaders and the lack of empirical research therein. Harris & Jones (2017, p. 215) call for 'a renaissance of research into middle leaders in schools', suggesting that it is now 'timely and important'. Ultimately Harris et al (2019, p. 272) conclude that the empirical understanding of middle leaders since 2003 'remains debatable'. De Nobile (2018, p. 1) concurs, and in his view middle leadership is 'under-researched and under theorised' while suffering from 'knowledge gaps' as to the 'nature of middle leadership roles' (De Nobile 2018 p. 1).

Having been involved in researching middle leadership for 10 years, Grootenboer et al (2019) argue that interest in the subject of middle leadership as a research focus has recently grown. They concur with Harris et al (2019) on the lack of a theoretical understanding of middle leadership, and, moreover, a lack of a 'situated understanding' of middle leadership practices. As such, there appears to be little or no understanding of middle leadership through a theoretical lens at present.

A clear understanding of the role of the middle leadership in schools is also apparently lacking in education policy. In their analysis of Irish and Scottish education policy, Forde et al (2018) conclude that while middle leadership is highlighted in policy, they question a lack in understanding of this multi-faceted role. Moreover, they suggest that education policy is in danger of being nothing more than a 'list of tasks of the middle leader's remit' (Forde et al 2018, p. 308). They concur with Grootenboer (2018) that research into the practices of middle leadership is the next step in order to inform education policymakers of the importance of the middle leadership role in achieving the ever-present objectives of school improvement, attainment and equity.

In the Scottish context, little attention appears to be paid by the Scottish Government education policy to the importance of the role of middle leadership in Scottish education. In the Scottish Government commissioned 2015 OECD report, 'Improving Scotland's Schools', while the 'middle' was discussed at length, it referred to the local government and the school, with no mention of the middle leadership in schools. Furthermore, little attention appears to be paid in Scottish Government education policy to the role of middle leadership in Scottish education. Currently the Scottish Government flagship education policy, The National Improvement Framework, provides a range of 'key drivers' including school improvement and teacher and practitioner professionalism (Scottish Government 2022). Therefore, it is evident how the term middle leadership is omitted in the policy text with only the generic term 'teacher and practitioner professionalism' being used by policy makers (Scottish Government 2021).

The importance of the role of middle leadership in Scotland, as identified by Forde et al (2018), continues to focus on the roles and responsibilities defined as standards of the regulation body, the General Teaching Council for Scotland (GTCS), who produces 'Standards for Leadership and Management' (GTCS 2020). Courtney (2018) questioned the development of the GTCS standards for the teaching profession generally, which was an attempt to further define the teacher career pathways in Scotland. She argued that the success of these standards, in practice, are unclear and requires further empirical study.

This research will attempt to answer the call for further research in a move away from previous research which has focussed on the role of middle leadership. This study will offer a more theoretical approach to the influence of middle leadership in education (De Nobile 2018) in terms of the practices they use in order to raise attainment. It will also explore the position of the CPT within the Scottish Government's flagship NIF policy which applies such generic terminology to a teaching profession operating in a hierarchical structure of promotions. So, who is the CPT in Scottish secondary schools?

At this juncture it would be prudent to offer a definition of the middle leadership role which will be explored in this study in the context of the CPT in the Scottish secondary school. Similar to Grootenboer et al (2023), unlike other school leadership roles, such as a principal or administrator, this study takes the view that middle leadership is defined as the role that has a teaching commitment while functioning as the conduit between the classroom teacher and senior leadership. In defining middle leadership, the GTCS (2021a) limits their definitions of the role to management and leadership. While administration has been previously defined as a discrete role, for the purposes of this study administration is included in the management role for clarity.

2.3 Middle Leadership – The Scottish Context

A review of middle leadership literature reveals the evolutionary change of the school administrator to that of a middle leader with an array of responsibilities closely linked to the enactment of government education policy and with accountability to school senior leadership (Highfield & Ruby-Davies 2022). Furthermore, a review of literature reveals how research in the field of middle leadership has somewhat fallen out of favour (Harris et al 2019). It has been critiqued by Forde et al (2018) as sparse and tending to focus on only the tasks of the role. Argued further is the lack of any theoretical understanding of the middle leadership role in schools (De Nobile 2018, Harris et al 2019) in an era of accountability (Murphy et al 2015, Mowat 2017) now demanded globally by governments through their education policies. Harris et al (2019) posit further that the lack of middle leadership research may be due to a shift in research interests to other types of leadership which have become more fashionable, such as the collaborative or distributed leadership approaches which may be more a more appealing give that they can involve teaching staff at all levels.

In the Scottish secondary school, there are a number of middle leadership roles, such as Principal Teacher Pupil Support or Support for Learning or Development. These posts, while having specific remits, have no leadership role within curricular departments other than a teaching commitment within their departments.

The middle leadership role of the CPT, and the focus of this study, carries the sole responsibility for leading and managing a curricular subject-specific department such as Maths or English or a responsibility for more than one curricular area such as Business Education and Computing in Scottish schools. These posts include Principal Teachers or Faculty Heads. Harris et al (2019) recognises the range of roles that can be defined as middle leaders. For the purpose of clarity, the middle leadership role being investigated in this research will use the singular term of CPT. This term encapsulates all middle leadership roles responsible for a curricular department.

In order to understand the position and role of the CPT in the Scottish Secondary School and the need for a new theoretical conceptualisation, this literature review will address the emergence of the middle leadership role in schools and how this role evolved from that of an administrative managerial role to the role of CPT in the Scottish secondary school in the 21st century, representing a significant shift in the conceptualisation of middle leadership. In terms of the role of the CPT, Forde et al (2018, p. 308) conclude that there are increased expectations from policy makers leading to a "list of tasks on the middle leader's remit". While it is the role and tasks of the middle leader which continue to take precedence, as described in previous research (De Nobile 2018, Forde et al 2018, Harris et al 2019), the position of the middle leader in education policy will be explored in enacting education policy.

Currently, in the Scottish context, education policy makers rely on 'teacher and practitioner professionalism' in order to enact the NIF policy (Scottish Gov 2022). The responsibility for defining and regulating teacher and practitioner professionalism lies with the GTCS, the governing body for

teachers in Scotland. In the context of middle leadership, the GTCS provides a list of roles and responsibilities known as 'standards' set out within the Standards for Middle Leadership document, which defines teacher professionalism as 'professional values are required to be enacted in everyday practice both within and out with the educational establishment' (GTCS 2021, p. 4).

Similarly, an understanding of the emergence and importance of school improvement in education and further in the Scottish education policy. The analysis of school improvement sets the context for exploring the practices of the CPT in achieving the Scottish NIF policy objective of school improvement through raising attainment.

2.4 The Curricular Principal Teacher (CPT) in Scottish Secondary Schools

The curricular middle leadership role in Scottish secondary school, which included the responsibility for delivering school improvements such as curricular development, leading staff development, and raising attainment, was met with significant changes in the early 2000s. In 2001, the McCrone Agreement (EIS 2001), as part of a new pay and conditions agreement with the Scottish Government, led to significant changes in the management structure within Scottish secondary schools (Anderson & Nixon 2010). This restructuring resulted in a flatter school structure due to the removal of several layers of management and the collapse of targeted departments to form new faculties (Anderson & Nixon 2010). This also led to a double nomenclature of the curricular middle leadership. Principal Teachers became responsible for one subject area and Faculty Heads were now responsible for newly formed faculties of two or more curricular subjects merged together with a corresponding increase in pay structure.

The structural changes in schools that have taken place since the McCrone Agreement in 2001 (EIS 2001) have led to mixed reviews of the impact of faculties (Anderson & Nixon 2010). Anderson & Nixon (2010) report improved collegiality in departments, a reduction in duplication of work and mutual

good practice. However, they also reported the negative impact of newly promoted, inexperienced CPTs with little or no understanding of the subjects within their faculties other than their own area of expertise. This concurs with the later view of Bassett (2016) who, as discussed previously, recognised a lack of training in middle leadership roles in schools.

Since the changes in structure due to the McCrone Agreement in 2001 (EIS 2001), the role of the Curricular Principal Teacher (CPT) as the middle leader in Scottish secondary schools has continued to change significantly from a largely autonomous departmental administrator with little accountability to and contact with senior school management to that of a sophisticated position as a middle leader. It is a position now accountable to senior management for leading and managing all aspects of the curriculum including teaching and learning, pupil attainment and equity, curricular development, and management of department staff including professional development. This is all in an effort to effectively deliver the demands of Scottish education policy focussed on school improvement, equity and attainment (GTCS 2021a).

The CPT management structure has remained intact and the incremental changes to the CPT role can be seen in the context of successive UK and Scottish Governments who seek to hold schools more accountable for raising attainment (MacBeath 2008). Holding schools more accountable was seen by governments worldwide as the key to building a highly educated workforce able to compete in an increasingly globalised economy (Bush 2008). In Scotland, as well as in the rest of the UK, this resulted in the decentralisation of education policy to local councils and schools by both Labour and SNP devolved governments through policies largely borrowed from the UK government (Mowat 2018). Current Scottish education policy views raising attainment as one of the main benchmarks of school improvement, thus achieving the current SNP government's goal of equity and narrowing the poverty gap in Scottish society (Mowat 2018).

Scottish education policy is enacted through local council education plans filtered down to schools who in turn formulate their whole school improvement plans which are then subject to inspection by local councils (Brown 2018).

The role of the CPT in enacting Scottish education policy through leading their departments is achieved through a closer relationship with senior school management, in essence becoming part of an extended leadership team (Forde et al 2018) via a line management structure which creates accountability and oversight. Senior management staff, who act as line managers, are assigned to specific departments by the head teacher who expect progress reports and annual departmental improvement plans based on whole school objectives.

CPTs perform a dual role between senior leadership and the classroom (Forde et al 2018). CPTs are responsible for providing senior management with detailed statistical reports on pupil attainment in SQA external exams together with a declaration of the strategies the curricular leader intends to employ within the department to further improve academic achievement. In their managerial role, the CPT is also responsible for the professional development of staff (GTCS 2021a), including an annual professional review in which the CPT is expected to both encourage and facilitate professional learning and development of the classroom teacher.

It is clear that the current role of the CPT is a complex and necessary one in Scottish Education and clearly a deserves a theoretical exploration to determine and recognise this important part played in enacting education policy for school improvement.

The subject of school improvement has dominated the education landscape, not only in Scotland but globally. An exploration of the emergence of school improvement as a school objective sets the context for understanding how

middle leadership is positioned in the achieving school improvement (Gurr & Drysdale 2013).

2.5 The emergence of school improvement

The origins of school improvement can be traced to the end of the second world war (McGill 1974). Post war, organisations began to be studied in order to find ways to make the most efficient use of the reduced workforce that was available, leading to a new understanding of how organisations could be developed and improved. The improvements in organisations and members led to an interest into how schools could be similarly analysed to achieve their own improvements (Hopkins et al 2014).

A contrasting view on the origins of school improvement is taken by Rutter (1983) who argues that it was a focus on the impact of pupil behaviour in schools specifically in the 1960s and 70s that led to a change in the view that schools could be improved though an increase in academic attainment. Rutter (1983) argued that the views expressed in the 1960s and 1970s rested on the belief that schools alone had no impact on behaviour or attainment. This view stemmed from research on the impact of corporal punishment, which concluded that such punishments had no effect on attainment serving only to create a climate of negativity and increased truancy. Crucially for Rutter (1983) the most important factor in achieving better pupil behaviour was the belief that school improvement could be achieved through improved pupil attainment which would result from pupils who were willing participants in their own education. In addition, there was a need for school involvement as a social organisation which could affect pupil attendance, behaviour and attitudes towards education (Rutter 1983).

Addtionally, in the 1960s there was a new recognition of the importance of school ethos in securing improvement in education outcomes (Miles, 1967, as cited in Hopkins et al 2014). Similarly Hopkins et al (2014) recognised the link between school environment and improvement strategies from the 1960s

still in use today, such as the school culture as a focus for change, target setting and networking.

School improvement gained further traction in the 1980s as a progression from school effectiveness (Biesta 2015). This was fuelled by major changes in education policies globally required to 'prepare students with the knowledge and skills to function in rapidly changing societies (OECD 2008, p. 23). As in many other OECD countries in the 1980s, the UK Labour government's education policy was implemented in order to not only secure school improvements, but to give schools autonomy and an accountability that would allow them to 'respond to local needs' (OECD 2008, p. 23).

By the 1980s, definitions of what constituted school improvement began to emerge. Such definitons reveal a range of factors which sought to define the improving school. Holly & Hopkins (1988, p. 223) view school improvement as 'more than just classroom change, it also presupposed attention to other "related internal conditions" such as the curriculum, the school organisational structure, local policy, school climate, relations with parents and so on'. In 2001 Hopkins & Reynolds argued that school improvement was in its 'third age' culminating in the need for school improvement to be seen as a field of study in its own right, focussing on student achievement, empowerment and research-based strategies with which to study improvement. Reezigt & Creemers (2005) provide again a further range of defining issues which they argue are faced by the improving school, such as the pressure to improve, to acquire the resources required for improvement and achieve educational objectives.

Despite clearer definitions of what constituted school improvement, in the 1990s, questions began to emerge regarding the efficacy of the theory and practice behind the increasing importance of school improvement. Hopkins (1995, p. 265) described improvement strategies in schools as nothing more than 'random acts of kindness', such as occasional increases in funding, which could disappear quicker than than they were introduced, in part due

to the lack of supporting theory or research in understanding any potential impacts. Reezigt & Creemers (2005) meanwhile point to the problem of providing an effective global model of school improvement capable of measuring success or failure due to the multiple differences between countries. Mourshed et al (2009) concur in describing the difficulty in drawing comparisons between countries due to different government policy goals and the ever changing nature of school improvement systems.

Moreover, other writers began to question the success of school improvement. Coe (2009), while acknowledging that there have been successful strategies leading to improvement, argues that there is scant evidence supporting school improvement. He partly attributes this to the inherently indiviual nature of schools and the challenges they face. Furthermore Coe (2009) advocates for a clearer definition of improvement success while looking more critically at school academic results that are commonly presented as evidence of improvement.

Though improvement in individual schools is evident, Hopkins et al (2014, p. 257) contend there has been less effort in achieving 'systematic improvement' across education. As such, they argue, there appears to be little understanding of any systematic change, if indeed any exists at all. Elgart (2017, p. 54) concludes that school improvement has 'failed to live up to its promise', arguing that there is no evidence of progress with international comparisons providing limited and unexceptional results. Elgart (2017) argues further that these poor results are due to the rapid changes implemented annually in the form of 'short-term fixes' which are at the expense of long term sustainable improvement. These poor results, Elgart (2017) argues, are further due to the limited measures used to monitor progress in equally limited improvement strategies. In their influential research, Mourshed et al (2009) also noted that despite a huge increase in investment in education by OECD countries, school systems had either remained stagnant or had in fact regressed in terms of school improvement.

Improvement has now become a predominant challenge for schools (Leithwood 2016) and remains a prominent feature of global education policy. The goal for schools to improve is popular. During the infancy of the new focus on school improvement in the 1990s, Hopkins (1995) saw the focus on improvement as an opportunity for schools to engage with external policy factors and make changes to their schools accordingly to benefit their pupils' education. Reezgit & Creemers (2005) point out that these policy factors may be ideologically driven by goverments. Later, Hopkins et al (2014) charted the progress of school improvement over four decades, which they defined as a series of 5 phases ranging from understanding school culture to a focus on student learning, leadership and systematic school improvement. These phases, Hopkins et al (2014) argue, highlight the importance of the factors required to achieve school improvement, such as the internal factors of school culture, self evaluation, the importance of school leadership, and perhaps, more importantly the ability of schools to recognise areas for improvement while building on any improvements already achieved. While school improvement is influenced by these internal factors, external factors provide further influence.

2.6 School Improvement and Raising Attainment in the Scottish context

The influence of external factors often results in schools being 'pushed towards' improvement from either school inspections or by government policy makers who can see the opportunity to embed their political ideological objectives within their policies (Reezigt & Creemers 1995, p. 411).

In the Scottish education context, Murphy et al (2015) describe how Scottish secondary schools are 'under constant and increasing pressures to improve'. The pressure to improve can be traced back to 1997 when the then Scottish Labour government followed UK Government policy in setting targets for schools (Murphy et al 2015). To that end, Scottish Government legislation came in the form of The Standards in Scotland's Schools etc. Act (2000). In

clear terms, this legislation set out the Scottish Government's expectation that school improvements should be led by and delivered through local councils. The expectation was that local councils would 'endeavour to secure improvement in the quality of school education' and to 'exercise their functions in relation to such provision with a view to raising standards of education' (Standards in Scotland's Schools etc. Act 2000, 2020).

Raising educational standards has become a permanent theme of the current SNP devolved government's education policy. In 2015, the Scottish Government unveiled the flagship Scottish Attainment Challenge (SAC) policy, which First Minister Nicola Sturgeon succinctly promoted under the argument that 'every child must have the same opportunities and an equal chance to succeed. That's why our top priority is raising attainment overall and closing the gap in achievement between young people in our most and least deprived areas' ('Focus on attainment - First Minister of Scotland' 2021). This policy was an attempt to address the poor attainment of disadvantaged pupils and their subsequent poor destinations after leaving school (Kintrea 2020).

The SAC policy was based on the Labour government's London/City/National Challenge policy introduced in 2003, which was aimed at school improvement. Mowat (2017, p, 309) criticised the 2003 policy as a borrowed policy taking a 'pick and mix' approach. While the SAC policy demonstrated a commitment to Scottish education and a focus on equity (Mowat 2017), it was not without further criticism. Arnott & Ozga (2010, p. 253) argued that educaton in Scotland has being utilised by the Nationalist SNP government as a 'policy space' to 'propogate' a nationalist agenda, one which appears to wax and wane then resurge when an election is approaching.

The Scottish Government's commitment to achieving equity and closing the poverty-related attainment gap through education grew from OECD commissioned reports which highlighted deprivation as a major determinant of educational attainment and life chances beyond school (Mowat 2018, Shapiro et al 2023). Subsequent to both national and OECD reports on the

education system in Scotland, the Scottish Attainment Challenge (SAC) was introduced by the Scottish Government in 2015 and 'sets out the vision and priorities of Scottish Education' to close the poverty gap in Scotland through raising attainment, specifically by improving literacy and numeracy, health and well being. The SAC policy is underpinned by a number of targeted policies: National Improvement Framework (NIF); Curriculum for Excellence (CfE); Getting It Right for Every Child (GIRFEC); Early Learning and Childcare (ELC); and Developing the Young Workforce (DYW).

The Scottish Government defines attainment as 'the measurable progress which children and young people make as they advance through and beyond school, and the development of the range of skills, knowledge and attributes needed to succeed in learning, life and work (Scottish Government 2021). In order to achieve improvement through academic attainment, the NIF policy and the Curriculum for Excellence (CfE) are a 'definitive plan for securing educational improvement' in Scottish education (Scottish Government 2021, p. 2).

The 2022 National Improvement Framework specifically defined four key priorities for schools in improving academic outcomes (Scottish Government 2022).

- Improvement in attainment, particularly in literacy and numeracy.
- Closing the attainment gap between the most and least disadvantaged children.
- Improvement in children and young people's health and wellbeing.
- Improvement in employability skills and sustained positive school leaver destinations for all young people.

These outcomes are further broken down into six key drivers:

1. School and ELC leadership
2. Teacher and practitioner professionalism
3. Parental/carer involvement and engagement

4. Curriculum and assessment
5. School and ELC improvement
6. Performance information

The NIF policy, in supporting the Scottish Attainment Challenge, targets funds towards local authorities in high areas of deprivation measured using the Scottish Index of Multiple Deprivation (SIMD 2022). The SIMD uses indicators such as level of crime and unemployment with an index of 1 indicating the most deprived area and 10 as the least (Worrell et al 2021).

The impact of globalisation and the need to be competitive has influenced the key drivers of Scottish education policy, which Mowat (2017) describes as education policy 'in an era of globalisation'. Rizvi & Lingard (2010) argue further that 'the globalisation genie has been let out of the bottle', and governments across the globe are taking a more neo-liberalist view in policy formation, associating policy with economic success though individualism, efficiency and market demand.

Tensions are evident between the neo-liberal globalisation of education policy structures and the focus of the current SNP government on social justice (Mowat 2017). In Scotland, this has been characterised in education policy by the identification of a gap between more affluent children and their counterparts in deprived areas. This is a gap which appears to increase steadily from primary to secondary school (Mowat 2018). While Watson (2010) argues that the Scottish Government was keen to be seen as more egalitarian in its approach to education policy, Kintrea (2020, p. 209) posits there is an argument that the Scottish education system has in fact 'become fully neoliberal'. Kintrea (2020) argues that while this may appear to be the case, there are fewer market pressures in Scottish education characterised by the non-selective nature of school allocation, which is dictated by the school catchment areas in which a child lives.

In a policy context, Arnott & Ozga (2010, p. 343) argue that the Scottish SNP government uses their education policy as a vehicle to support their

nationalist agenda, describing it as ‘a key area for the SNP’ and that it is demonstrated through the use of key phrases in policy documents such as ‘equality’ and ‘equity’. Furthermore, Arnott & Ozga (2010) argue that the global comparisons made by the SNP government are used to further the SNP main policy objective of achieving independence. Nevertheless, the Scottish Government must balance the necessity to formulate education policy, which serves the need to compete globally, while addressing the national problem of a poverty-related gap in Scottish society (Mowat 2018).

The pledge to raise attainment through improvement in schools is viewed by the Scottish Government as an integral means of closing the poverty gap (McCluskey 2017). Scottish education policy has sought to close the gap by defining the standards for school improvement based on raising attainment strategies implemented by schools. These standards provide the means by which the Scottish Government can measuring the success achieved in raising attainment, and as such these standards have become a primary focus of the success of Scottish education policy implementation (Kintrea 2020).

In order to define improvement and provide a means of quality assurance and self-evaluation, a series of quality indicators and themes were devised by Education Scotland, a government funded body tasked with supporting quality and improvement in Scottish education. The document ‘How Good is our School?’, now in its fourth edition, provides definitions of improvement in three key areas within schools: Leadership and Management, Learning Provision and Successes and Achievements (How Good is Our School? 2015). These quality indicators are used by schools as a means to self-evaluate their own improvement against the quality indicators and also by the Education Scotland Inspector of Education as the benchmark for conducting school inspections.

Through legislation and policy, the Scottish Government has provided local authorities and schools with the means to understand and pursue school improvement aimed at closing the poverty-related attainment gap. In

addition, through the quality indicators, the Scottish Government has also provided itself with a mechanism with which to evaluate its education policy objectives in schools. School inspections provide the means to praise schools who achieve improvements while also demanding that a failing school on receipt of its inspection letter must 'amend its school improvement plan to bring about any improvements that the letter says are needed' (Education Scotland 2020). While Murphy et al (2015) point out that improvement is relative to the school being inspected and does not necessarily lead to uniformity in school improvement nationwide, there are means of measuring school improvement which have developed to do just that.

2.7 Measuring School Improvement

'The world of schooling is complex' argue Scollay & Everson (1985, p. 208), arguing further that the complexity of schools creates problems in attempting to measure improvement though the use of quanitatave data. Scollay & Everson (1985) suggest that this focus on quantitative data leads to the danger of valuing only that which can be measured as opposed to measuring what the real value of education is in schools. Indeed, Biesta (2010) agrees, and further defines measurement as 'normative validity'. He argues that what is being measured is essentially what becomes of value and, mistakenly in his view, becomes the definition of what is worth measuring. Scollay & Everson (1985) argued that qualitative data is just as important given that much more is achieved in schools than can be measured quantitively through standardised tests. Biesta (2010, p. 13) goes further, describing education as 'a mortal practice' with other functions such as socialisation and subjectification which, he argues, are just as important qualifications.

Therefore the tools used to measure school improvement, it seems, need to be viewed in context and not accepted as the main indicators of the quality of education in schools. However, in terms of policy making, it appears that quantiative measures and subsequent data collection that follows are used

as drivers in education policy decision making in the quest for school improvements (Mowat 2017).

The measurement of education in schools, as Biesta (2010) points out, evolved from school effectiveness into the wider context of school improvement. Furthermore, it is the movements of both school improvement and effectiveness which have led to the measurement of performance that is now faced by schools. This is a system which Biesta (2010) argues is based on the causality model of medicine. He argues that while the impact of medicine on a patient can be measured, this is not so easily done in the context of education, where normative professional judgement of pupils by teachers plays a crucial role.

The criteria in measuring school improvement in Scotland is similar to strategies from around the world which also focus on the quantitative data generated through academic performance. In Scotland, this is done through a range of activities: The Scottish National Standardised Assessments (SNSA) for P1 to S3 pupils (Scottish Government 2023), SQA Qualifications for S4-S6 pupils, INSIGHT, a benchmarking tool used to compare formal external school exam performances (Insight Help and Support 2023); and strategies on an international level through the OECD Programme for International Student Assessment (PISA) (OECD 2023). At a local level, Scottish schools are also cognisant of the Scottish Government's use of the SIMD quantitative measurement to target school funding more effectively (SIMD 2022).

Similar to other countries, the relationship between poverty, heath and social outcomes is measured by governments and used to influence policy and evaluate its effectiveness (Ralston et al 2014). The SIMD measurement in Scotland is achieved through a series of deciles, from 1 being most deprived to 10 being the least deprived area (SIMD 2022). These deciles are used by local councils and schools to identify and support eligible pupils in deprived areas in an attempt to raise their academic attainment to that similar to their counterparts in the more affluent areas of Scotland. However Kintrea (2020) points out that SIMD deciles may not be a good indicator of

deprivation given that people can experience deprivation regardless of the decile they reside in.

The SIMD measurement is used to ensure schools are correctly allocating extra resources to pupils in areas of deprivation in an effort to improve equality in education which could ultimately show improvement in the NIF performance indicators and closing the poverty related attainment gap.

The funding allocated on the basis of the SIMD decile measurement is awarded to eligible schools through the Pupil Equity Fund (The Scottish Government 2022). As a consequence of receiving this extra funding, schools are required to highlight and measure the academic results of identified pupils with those in SIMD deciles in other councils. This means schools are held accountable for the choices made in allocating the extra finance and the impact on attainment (Education Institute for Scotland 2018, Forde et al 2021).

However, while SIMD is used by the Scottish government to raise attainment through the allocation of additional funding to schools, Perry et al (2017) conclude that encouraging pupil attendance and an understanding of the value of education could have a better impact on raising pupil attainment. The use of an arbitrary measurement like SIMD deciles can be seen in contrast to the the conclusions of Perry et al (2017), who highlight the difficulties in challenging family apathy and negativity toward education as this is a much harder solution and will take longer for policy makers to enact, as opposed to a potential quick fix through financial incentives to schools.

Any improvement in NIF performance indicators could result in the ability of the Scottish Government to hail the NIF policy as effective and yielding results in achieving the political agendas of equity and improvement in education outcomes for young people. This sees a return to the point made by Biesta (2010) in that it is what is measurable, and perhaps desirable, in revealing the success or failure of education policy enactment that becomes of value not only to governments in search of policy success but also for the

pressure on schools to take accountability. In the Scottish context, the measurable target focusses on raising attainment.

2.8 Raising attainment in Scottish Secondary schools.

One of the main criteria used by the Scottish Government in measuring the poverty related attainment gap continues to be the academic achievement of pupils in national qualifications (Scottish Government 2020).

To the world beyond the school gates, Scottish secondary school academic performance continues to be measured against that of other countries in terms of attainment through results in SQA examinations for children between the ages of 15-18, referred to in Scotland as 'the senior phase' (Kintrea 2020). In Scotland, following the release of national qualification results to all pupils in August of each year, the results are made available to all secondary schools nationally through the INSIGHT tool used by schools 'to analyse, compare and improve performance of pupils' (Sutherland 2014). This analysis includes the ability to make comparisons between schools as well as benchmarking against both local and national priorities. As such, these comparisons provide a key basis for future drivers for individual school improvement plans.

The pressure for continual improvement measured by raising academic attainment in the senior phase is in part due to the ready-made ability to scrutinise the level of improvement against government education policy though mass media. The media attention which is afforded the annual SQA results in August can result in politicians finding themselves in the uncomfortable position of being pressured to defend their policies. As such, U-turns or even changes in policy direction may occur (Scotland's exam results: John Swinney denies deprived pupils were penalised 2020).

Pupil academic performance is used to measure improved attainment and the quality of education on the international stage via the benchmarks of the OECD PISA programme, which leaves government education policy open to further scrutiny. Kintrea (2020) concludes that measuring attainment in

Scotland has been ‘moderately successful’, quoting a ranking of 18th out of 37 PISA countries in 2012 (though PISA ranking remain a problematic measure of attainment) (Jerrim 2021). Despite this, inequalities still remain in Scottish education which raises questions about the ability of the Scottish Government’s education policies to raise attainment successfully while achieving their aim of closing the poverty gap (Mowat 2018).

Within the school, the role of the CPT in managing raising attainment is governed by an assessment framework developed in 2011 which set out a variety of factors used to assess pupils, such as reporting, standards, recognising achievement, departmental quality assurance, and moderation exercises (Education Scotland 2022). In the OECD’s (2021) recent review of Scottish education, they explored the progress made since the introduction of the Curriculum for Excellence. However, they also acknowledged the agency of teachers in the assessment process. Interestingly, there is no specific mention made of the role of CPTs or middle leaders in leading the assessment process.

It is important now to explore the agency of teachers in schools to enact education policy, which is crucial in achieving political objectives such as school improvement or raising attainment.

2.9 Schools, Teachers and Education Policy Enactment

The role of schools in the UK has now long been subjected to the education policies of successive governments in an effort to raise standards in education, leading to an improvement in the ability of the UK to compete on a global scale (Watson 2010). This priority of global economic competitiveness in addition to social, cultural and territorial priorities continues to be evident in current Scottish education policy (Arnott 2017).

In Scotland, the positioning of schools and the tension of their relationship with education policy generally can be illustrated through the following description of school accountability.

> One of the tensions in this policy area is around accountability. National policy is a matter for the Scottish Government. However, local authorities have the statutory responsibility for the provision of education (along with parents/carers) and schools themselves have a great deal of responsibility over what is taught and how it is taught. Much of school education policy is developed collaboratively through high-level policy forums and delivery is localised (Sharratt 2019).

Schools and their local authorities can be viewed as being 'subordinated' by government education policy, resulting in schools which are weighed down by the pressures placed upon them to achieve education policy objectives (Braun et al 2010, p. 547). In the Scottish context, the pressures of policy are equally evident. Sosu & Ellis (2014, p. 16) describe the 'governance arrangements' placed on local authorities and schools and the 'agencies which shape what happens in schools'. Teachers at all levels in schools are expected to be familiar with the education policies formulated by government, especially as the policy actors (Ball et al 2011) are held accountable for how education policy is enacted.

In the Scottish context, despite the creation of additional national bodies to oversee education policy (which includes a teachers' panel), Humes (2020) concludes that these national bodies continue to suffer from bureaucracy and 'professional protectionism', hampering how policies are interpreted in schools. Priestly & Minty (2013, p. 50) also concluded that while Scottish education policy advocates for teachers as 'agents of change', the culture and structure surrounding teachers works to constrain how they are able to engage with policy. Despite these constraints, teachers, through the GTCS professional standards, are still expected to 'critically engage with current legislation and policies' (GTCS 2021a, p. 8).

Previous research of education policy enactment in schools has identified factors which can influence how teachers engage with education policy and is therefore worthy of further exploration. In addition, given this research incorporated a CHAT theory which requires the analysis of the tools used in

practices, the arguments of McGuire et al (2011) and Ball et al (2012), who advocate for policy enactment rather than implementation, resonates with the purpose of this research. Their view on the importance of exploring the range of physical characteristics of schools, such as artefacts, as this can reveal certain aspects (like power relationships) is a compelling one. Analysis using a CHAT theoretical framework also requires an exploration of the subjects involved and the division of labour explored through the analysis of the practicalities of how teachers seek to enact education policy in schools.

Education policies have been described as 'trying solve a problem' (Braun et al 2011, p. 586) in a rather prescriptive way through policy texts, which seek to provide a limited set of options from which particular outcomes are expected (Ball 1994). Braun et al (2011) argue that education policies do not tell schools what to do but rather create the circumstances from which policy options can be selected. Further, Ball et al (2012) argue that the reason policies do not specifically tell schools what to do is because of polices which are formulated based on an ideal school model and which do not exist in reality. As such, it is the responsibility of individual schools and their teachers to put policies into practice, based on the context of their own schools. Bergmark & Hanson (2020, p. 450) concur, noting that education policies are 'not set in stone' and can be subject to negotiation and interpretation by schools; as such, it is the teachers who become 'agents of translating policy into practice'. Mowat (2017) argues further that governments in Scotland and globally have actively encouraged schools to take an autonomous control of education policy and that this has led to a greater and convenient accountability on schools and a convenient detachment for governments. So, while policy documents may appear prescriptive, schools are perhaps conveniently putting policy into practice.

The reality is that education policy is formulated and disseminated top down from government policy makers. It is enacted by local councils and eventually reaches schools (Bergmark & Hansson 2020). A distinction can be made at

this point as to what happens to policy once it reaches within the school gates. Are policies formulated by the government implemented or enacted by schools and ultimately by teachers? This an important consideration for this study in order to understand the outcomes of education policy in the context of how it is interpreted by teachers through their practices. The way policy is interpreted can be examined through policy enactment or policy implementation. As such, both of these stances are explored in order to contextualise the practices of the CPT in raising attainment.

Policy implementation is described by Spillane (2000) as a cognitive process which involves teachers as 'implementers' being influenced by policy, resulting in a change of teacher mind set. Spillane (2000, p. 171) concludes that in order for the policy implementation process to be successful, there must be a change of 'cognitive schemata'. Spillane (2000) acknowledges the importance that teachers play in the implementation process. However, this can be viewed as narrow and ridged, lacking acknowledgement of the impact of the complexities in schools such as culture, community and practices (Ball et al 2012). Similarly, Bergmark & Hansson (2021) argue that a focus on implementation gives a limited perspective which takes no account of the variety of pressures which schools face.

In advocating for a policy enactment rather than policy implementation, Ball et al (2012, p. 3) argue that policy enactment can be regarded as an organic process and as the result of policy which is 'translated from text to action'. This organic process leads to policy being enacted through a variety of creative processes developed by different policy actors, leading to policy driven practices viewed in the context of the individual schools (Maguire 2014). Ultimately, Ball et al (2012) advocate that policy enactment, as opposed to implementation, takes cognisance of a wide variety of factors which influence how policy leads to practices in schools such as the collective and collaborative nature of the relationship between policy actors, dialogue, written text and

technology. Ball et all (2012, p. 3) conclude that 'policy is not done at one point in time; in our schools it is always a process of 'becoming'.'

In the context of this research, cognisance was paid to the importance of policy in contextualising the role of the CPT. Given that the focus of this study is to understand the practices of the CPT in attempting to raise attainment governed by Scottish education policy, an exploration of policy enactment was undertaken. This allowed for a variety of factors, such as policy actors, the nature of relationships and policy practices, to be defined and explored rather than studied through the limited lens of policy implementation.

The type of policy and method of enacting the policy in schools by teachers can depend on whether the policy is optional and potentially ignored or mandatory and acted upon (Maguire et al 2015). Policies can also be complex in terms of how they are both encoded at a government level and how they are decoded and contextualised at a school level (Maguire et al 2015). This can therefore impact exactly how and whether policies are enacted as the policy writer intended. Ball et al (2011c) argue further that the type of policy can result in teachers being shaped in different ways, as subjects of policy.

Given that schools are impacted by both internal and external contexts, Braun et al (2011) argue that the external context in which schools operate has been largely ignored in policy enactment research, leading to a lack of understanding as to how effectively school management operates in both contexts. Ball et al (2012) concur, claiming that while context is a concern when exploring school improvement, it has been lacking in policy enactment research. In an attempt to address this issue, Braun et al (2011, p. 588) identified a number 'contextual dimensions' (Figure 2.1).

Contextual Dimensions

- *Situational* contexts (such as local, school histories, intakes and settings).
- *Professional* contexts (such as values, teacher commitments and experiences and 'policy management' in schools).
- *Material* contexts (e.g. staffing, budget, buildings, technology and infrastructure)
- *External* contexts (e.g. degree and quality of local authority support, pressures and expectations from broader policy context such as Ofsted ratings, league table positions, legal requirements and responsibilities.

Figure 2.1: Exploring the framework of policy enactment through contextual dimensions (Braun et al 2011).

These dimensions can be used to both explore individual contexts influencing schools and also relationship between dimensions. The hope in devising these contextual dimensions is to provoke further thinking and challenge the idealist view of schools that exists in current research (Braun et al 2011). However, Braun et al (2012) caution that the context in which factors affecting schools are interpreted can still vary even in schools which at first appear to be very similar.

The physical aspects of the school environment can provide a further factor worthy of consideration when analysing policy enactment. McGuire et al (2011) look to Foucault as inspiration for identifying artefacts within schools from which policy discourses can be gleaned, thus providing physical evidence of how policy is being enacted. Such artefacts could include anything from the organisational structure of the school to school-generated documents where policy discourse and enactment may be evident. McGuire et al (2011, p. 608) argue that attention to school artefacts has been missing when investigating policy enactment through theory alone given, they argue, that 'artefacts are fundamental to the co-production of school activities'. Ball et al (2012, p. 121) concur with this view, ascribing to the value of analysing school 'policy artefacts' as tools which can represent how power is translated in school policy through various school resources or activities.

The impact of local circumstances on policy enactment is described by Ball et al (2011b, p. 611) as 'a network of social practices which are infused with power'. The problem here, Ball et al (2011b) argue, is the tension in defining the position of teachers in policy either as subjects or actors, as well as the problem of attributing where agency occurs given that teachers do not act autonomously and are subject to managerial and curricular constraints from schools and outside agencies in the Scottish context, such as the GTCS, HMIE and SQA.

In analysing and exploring education policy enactment in schools, it is clear that the role of the teacher is a complex one. Ball et al (2011a) recognise that policy enactment is not uniform within schools due to a variety of professionally related factors such as experience, length of service, aspirations and not least that teachers are not equal, given the organisational structure which determines the level of responsibility of teachers from classroom to senior leadership. As such, this can mean that teachers can view policies differently depending on how they are affected by them. As policy actors, teachers are able to enact policy through the power of the activities they practice, which Ball et al (2011a, p. 625) argue can either be through their own creative interpretations or through those required by middle or senior management. They further contend that this tension in enacting policy creates a paradox for teachers leaving them 'torn between discomfort and pragmatism' (Ball et al 2011b, p. 636).

Rather than analysing the lived experience of teachers and the power of their position in order to understand how teachers enact policy, Bergmark & Hansson (2021, p. 450) advocate for a more theoretical approach. They suggest a framework which identifies individual factors such as 'existing beliefs, knowledge and experiences' which impact teacher understanding of policy. The wide range of factors identified, they argue, necessitates a process of 'sense making' in order to investigate the variety of ways in which teachers

understand policy, which can help clarify how policy is being interpreted by teachers and then enacted in schools as a whole.

In their research of how teachers and head teachers interpret policy, Bergmark & Hansson (2021) concluded that the main difference between these two groups was evident in terms of knowledge in terms of the curricular knowledge of the teachers or the managerial knowledge of the head teachers. In identifying these differences, Bergmark & Hansson (2021) concluded that head teachers were more inclined to be more accepting of how the policy was defined by the state without question while teachers were more critical of policy.

Given the wide variety of contexts and factors which can affect how policy is implemented in schools, Ball et al (2011a, p. 637) argue that schools may not be the most appropriate 'unit of analysis' when investigated policy enactment, describing schools as a 'creaky social assemblage', continually bombarded with conflicting expectations and possible instability. As such, Ball et al (2011b) argue that this instability is managed by schools through interpretation, translation, performance and practice in an attempt to navigate a way to enact policies in the manner expected of them while still maintaining the core objectives of the school, which may include tasks as simple as providing engaging lessons. This tension appears to be something researchers agree upon. While this may seem to be a negative situation schools are being faced with, Bergmark & Hansson (2021, p. 464) conclude that policy enactment can provide both challenges and opportunities for schools and teachers, which can also be a 'rewarding, if complex process'.

2.10 A Theoretical Approach

This section now searches for a theoretical approach which could provide the theoretical framework for understanding of the practices of the CPT in enacting the Scottish education policy objective of closing the attainment gap through raising attainment. While Foucault and De Nobile were

considered, it was practice theory which Nicolini (2014, p. 6) argues puts centre stage the 'power, conflict and politics as constitutive elements' of the practices that people use to do and think in a variety of ways. Practice theory presents as the best theoretical approach given the specific role of the CPT. The practice theories of Bourdieu (1984), Giddens (1985), Kemmis (2014), Schatzki (2018), and finally Engestrom (1987) were considered due to their focus on human agency and the social setting.

Practice Theory

To explore the role and influence of the curricular principal teacher (CPT) in enacting the Scottish Government policy objective of raising attainment in Scottish secondary schools, a range of approaches were initially considered.

- A Foucauldian lens to study power relations of the CPT
- The Middle Leadership in Schools Model of De Nobile (2021) in terms of the various roles adopted by CPTs.
- Practice theory as a means of conducting theoretical analysis of the activities undertaken by the CPT within the school setting.

Through an initial exploration of these possible approaches, it became clear that a closer examination of the potential for practice theory to act as the theoretical approach for this study was necessary and valid since only one piece of middle leadership research has been recognised as using a practice theory since 2002 (Bento et al 2023).

Given that RQ2 explores the practices of the CPT, it is necessary to distinguish between a practice and practice theory. Grootenboer (2018), when focussing on practices, settles on a definition of organised social activities which can be ongoing and ever changing, making use of both physical and non-physical mechanisms. Nicolini (2013) adds that, as an individual, being part of a practice means being absorbed into that practice

through thinking and feeling, and in doing so conforming to the norms of that practice. The practice itself therefore can be viewed as focussing on the individual, the social phenomena which arises from the activity, and the influence by a variety of factors necessary in getting the practice done.

In contrast, practice theory focusses on exploring the theoretical relationships 'that explain the dynamics of everyday activities' in a variety of contexts and studying the consequentiality resulting in the production of social life (Feldman & Orlikowski 2011, p. 1241). Nicolini (2013) argues further that practice theory explores the social and human phenomena through examining the role of individual, objects, knowledge, discourse, interests and power. Practice theory therefore allowed RQ2 to be explored in terms of phenomena arising from the relationships, dynamics and social contexts in which CPT practices take place.

It is generally accepted that there is no one singular theory of practice due to the diverse and complex nature of everyday practices (Nicolini 2014); rather, there is a 'family of theoretical approaches' which can lead to a deeper understanding of daily life (Grootenboer et al 2017, p. 2). Given that there is a 'family' of practice theories which could have potentially been adopted as a lens for the current study, it was important to explore a range of potential practice theories which could be applied to research in the field of education prior to selecting the most appropriate theory.

Subsequent to this detailed exploration of a range of practice theories, the Cultural Historical Activity Theory (CHAT) emerged to me as the most applicable approach for purposes of this research.

The investigative process involved an exploration of the nature of practice theory and of the most prominent and influential practice theories shaped by the following questions:

1. Has the theory had been tested empirically?
2. Has the theory had been applied to the field of education?
3. Has the theory been applied or could be applied to the role of the CPT in secondary schools?

The practice theories explored here, in chronological order, were those espoused by:

- Bourdieu (1984)
- Giddens (1985)
- Kemmis (2014)
- Schatzki (2018)

From the exploration of practices theories, Engestrom's (1987) Cultural Historical Activity Theory (CHAT) emerged from the 'family' of practice theories and merited further consideration as a possible research lens given its application to the field of education (Lee 2011, Postholm 2015, Trust 2016, Hancock & Miller 2017).

2.11 The nature of practice theory

Practice theory can be effective when exploring small phenomena in organisations where social interactions are the focus of the research as opposed to an exploration of the organisation as a whole (Nicolini 2014). Reich and Hager (2014, p. 419) contend that practice as a concept has been 'taken for granted and under theorised'. It can be argued that this is perhaps not the case given the range of practice theories which have emerged since the 1970s, which are discussed here.

Given that this research is focussed on the practices of CPT in the middle management role in the Scottish secondary school, it is interesting to note that Kavanagh (2012) asks the following question: is management a practice at all? Kavanagh (2012, p. 107) presents the argument that management is not a practice, arguing initially that managers are no more than 'amoral

implementers of bureaucratic rationality'. Kanvanagh (2012, p. 108) also contends that management is in fact a practice defined as 'a coherent and complex form of socially established human activity' given that managers are responsible for a wide range of responsibilities other than bureaucratic tasks which 'constitute the human condition'. This influence on the human condition perhaps leads into the realms of the leadership aspect of middle leadership practices.

Reckwitz (2002a) describes practice theory as a cultural theory emanating from structuralism and influenced by phenomenology and hermeneutics. Unlike the theories of Bourdieu (1984) and Giddens (1985), which are discussed later, he describes in detail the elements which constitute a practice and the importance of practice in understanding the social world.

The human body, knowledge, and routines, argues Reckwitz (2002a), are central to the empirical analysis of practices. Reckwitz (2002a, p. 25) defines practice as 'the regular skilful performance of bodies' where social practices are the result of training the body in a particular way, not just with routinised physically activities but also with routinised mental activities. These mental activities are not internalised but are deemed essential to carry out the necessary activities of the practice, which would be an important point to note in an organisational setting (Reckwitz 2002a). As such, the body is not simply a tool to be used to perform actions, as in Gidden's theory. By including the mental aspect of activities, the human is the 'carrier' of practices which give order to the social world (Reckwitz 2002a, p. 251). Spargaaren (2011) argues that the human as the agent of practice is not central to the analysis of practices; rather it is the practice itself made up of rules and resources which influences the behaviour of the human within the practice that matters most. In terms of the current study, Reckwitz (2002) provides a more persuasive argument given that the CPT is at the centre of the analysis of practices and the important inclusion of the mental aspects of associated with a carrying out activities which involves interacting with the rules, tools and resources within practices.

The advantage of a range of practice theories allows for a wide variety of social practices to be explored as 'ontological projects with a new vocabulary to describe the world' (Nicolini 2014, p. 9). Reckwitz (2002a, p. 257) urges caution because practice theory does not offer a 'theoretical system' which can compete with other established theories, such as Parson's socialisation theory or Luhmann's systems theory. Reckwitz (2002a) concedes that practice theory does, however, provide a 'heuristic device' with which to research a variety of subject areas, including education.

The use of practice theory can also be seen as a challenge to the agency/structure dualism of structuralism theory (Nicolini 2014, Spargaaren 2011). Rather, by developing alternative concepts through practice, theorists such as Bourdieu (1997) and Giddens (1984) advocate for an amalgamation of human agency and structure, rather than a micro/macro dualism. As such, humans are not perceived simply as obedient agents within social structures but are central to those social structures (Reckwitz 2002a). In essence, therefore, the relationship between human and structure can and should be viewed simultaneously within the context of practices (Grootenboer 2018).

The dualism debate is further argued through practice theory to explore organisations not as rigid, structural-mechanistic entities that humans interact with, but by taking a more fluid approach through the exploration of 'bundles of practices' simultaneously conducted in organisations and overseen by management (Nicolini 2014, p. 2). Feldman & Orlikowkski (2011) concur, suggesting that using a practice lens is appropriate in organisational research. They explore three specific aspects of the organisation. By understanding organisational structures, the actions that people take within these organisations and the role of practices. More specifically, Feldman & Orlikowkski (2011) describe how practice theory has been used to explore specific aspects of management strategy within organisations, such as the management knowledge which appears in organisational literature and the institutionalism of the relationships between humans and the organisations in which they operate.

The use of a practice theory to explore the role of the CPT in Scottish secondary schools is appropriate given that schools operate as organisations with their own histories, traditions, cultures, and ethos, and allow humans to interact through a wide range of social interactions and practices.

2.12 An Exploration of Practice Theories

Bourdieu

Pierre Bourdieu is credited with being one of the leading proponents of social theory and one of the foremost social philosophers of the twentieth century through his attempts to explain social life as a series of practices (Nicolini 2014, Grenfell 2012). Bourdieu has been criticised for his difficult to comprehend writing style, which he defended as being the result of the difficulty of the subject matter inherent in social reality (Scott 1999).

Bourdieu (2007, p. 101) attempts to unpack the logic of ordinary lives through 'the formula [(habitus) (capital)] + field = practice', which he believes illustrates the concept of practices. Practices, he argues, result from the relationship between a person's internal dispositions which determine how they see and act in the world (habitus) (Power 1999), the individual's social position in the field they are active in (capital), and within the current state of play of within that social area (field), (Maton 2012).

It is this equation which provides the theoretical concepts or a 'set of thinking tools' (Maton 2012, p. 51) to analyse the relationships and social structures which influence human practices in everyday life (Apps et al 2014), while also providing a means to understand how power and control influence daily practices (Power 1999).

In terms of education research, the use of Bourdieu's theory has been criticised not only because of the difficulty in understanding the language but also in the way it accesses the theoretical constructs in a meaningful way (Apps et al 2019). Mills (2008) concurs, arguing that Bourdieu's theory is misunderstood in terms of the level of impact it has on explaining human agency, power and domination in practices and also due to the deterministic

nature of the habitus. In using Bourdieu's theory, Rawolle & Lingard (2018) point out the importance in education research to ensure that the theoretical concepts of habitus, capital, field and practice are applied in conjunction with other empirical research methods, which can then allow social phenomena to be analysed within a located field.

While he is not an educational researcher, Bourdieu was involved in the field of education when advising the French government on the implementation of a new national curriculum (Bourdieu 1990). Furthermore, Bourdieu's theory has been applied to some research which has focussed on inequalities in education (Bourdieu 1990). Mills (2008, p. 87) advocates for the use of Bourdieu's theory in education, arguing for the transformative abilities of the theoretical concepts to address the inequalities in the educational outcomes for 'marginalised students'. More recently, Apps (2019) has applied Bourdieu's theory to exploring the inequalities of digital technologies in schools when defining the field of analysis and then applying the concepts of habitus, capital and field to the family, student and school.

Is Bourdieu 'worth all the candle?' Nash (1999, p. 185) asks, concluding that it is unlikely. Nash (1999) argues that in finally understanding Bourdieu's concepts, after almost a decade in his case, this awareness does not lead to a better understanding of the world, but merely provides a means to encourage further thinking. Meanwhile, Dalal (2016) argues that Bourdieu was more concerned with the sociology of education rather than any analysis of educational practices.

To me, while Bourdieu attempts to provide a theoretical approach to practices, it does not appear that he considered how his theory might actually be used in practice. Therefore, perhaps the fact it is difficult to understand and is limited in its application is irrelevant. Consequently, I find myself in agreement with Nash (1999).

The aim of the current research is to explore the role and importance of the CPT in schools when enacting education policy through the analysis of practices. As such, the lack of empirical application and the complex nature of Bourdieu's difficult to understand theoretical concepts, which appear to focus mainly on the internal and external factors and lead to practices rather than on the practices themselves and their impact, renders Bourdieu's theory unsuitable for the current study.

Giddens

Giddens' structuration theory is viewed as equally important to the emergence of practice theory (Nicolini 2014). Giddens' (1985, p. xxvii) view of practices arises from his objective to 'escape from the dualism of objectivism and subjectivism' to a dualism of agency and a structure for the production of social systems, which Giddens refers to as the 'duality of structure' (Giddens 1985, p. 25, Figure 2.2).

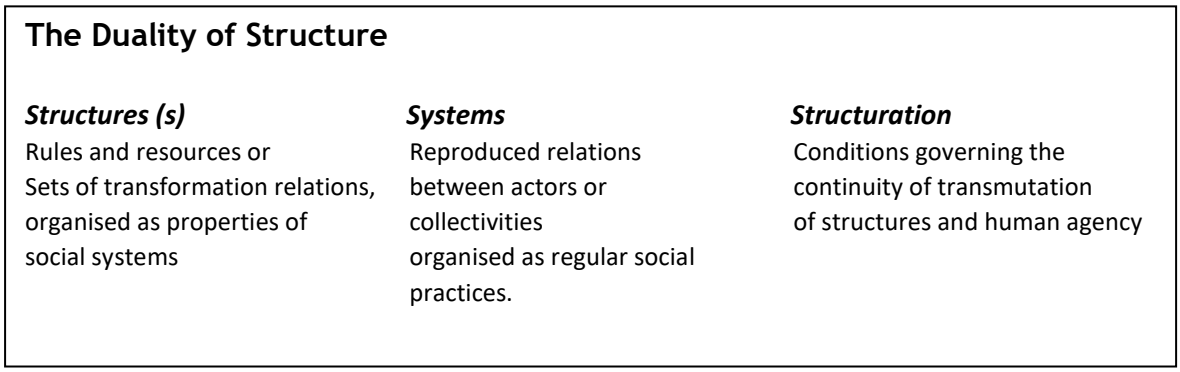

Fig 2.2 The Duality of Structure (Giddens 1985, p. 25)

Giddens (1985) defines structures as the rules or norms used by actors to enact or reproduce social actions using resources which have the ability to be both enabled and constrained within a social system. He argues further that the agency involved in the production and reproduction of the actor's actions within the social system leads to what he defines as structuration. This means that structuration leads to human agency and structure together within the social system, which is 'mutually generative' (Nicolini 2014, p.

45). It is through structuration, Giddens (1985) argues, that social systems are reproduced and maintained over time. Social systems can endure and survive through lifetimes, such as the handshake. Burridge (2014) argues further that it is only through human agency that structures exist at all. Structuration theory therefore allows for the exploration of complex social interactions with a clearer focus on human agency than the work of Bourdieu.

However, Giddens did not conduct any empirical research of his theory, himself stating that his theory was never meant to provide a model for research (Giddens 1985). The prominence of human agency in Gidden's theory has been criticised for reducing practices to mere activities and ignoring the impact of human emotions, instead relying on the assumption that humans are entirely 'rational and reflexive' Nicolini (2014, p. 50). Whittington (2015) conversely acknowledges a popularity of Gidden's theory as the fifth most cited research in social science. However he also points out the lack of practical application, particularly in organisational research.

In terms of education research, attempts have been made to apply Gidden's theory to practices. Giddens (1985) in fact attempted to illustrate his own theory by applying it to Willis's (1977) book *Learning to Labour,* a study of working-class school children. Burridge (2014) applied both Bourdieu and Giddens to two case studies exploring the difficulties of changing classroom teaching practices through an analysis of both social and individual factors. While Burridge (2014) was able to discover the reflective and collaborative environment which actively led to teachers reviewing their teaching practice, he described his findings as preliminary and requiring further research. Day Ashley (2010, p. 350) used structuration theory as a lens to explore education practices in private schools in India, concluding that Giddens theory is 'certainly not straight forward or uncomplicated'.

While structuration theory acknowledges the role of practices, it proved unsuitable for this study due to an overriding focus on agency, a lack of

application in empirical research, and the problems previous researchers have encountered in applying structural theory to their own research (Nicolini 2014).

Schatzki

The works of both Bourdieu and Giddens are evident in later practice theory by Theodore Schatzki (Hopwood 2016). Schatzki (2018), in his discussion of the current state of practice theory, acknowledges that there is no one single theory, concluding that the number of theories of practice are central to social life and reflect how practices are conducted indefinitely by numerous people. Schatzki argues that practices include several common characteristics derived from social phenomena such as power, religion, science or prejudice which together form, or are at least a central part of, practice 'constellations' (Schatzki 2018, p. 154).

Within these constellations, an additional characteristic which, according to Schatzki (2018), cannot be articulated is the capacity of human know-how in performing practices. The argument here for Schatzki (2018) lies in the difficulty in understanding the relationship between the non-individualist nature of practices and the individual carrying out the practice. This, he argues, cannot be achieved through simply analysing linguistic information. The issue here in articulating the impact of human capacity is due to a range of other factors which can affect an individual when carrying out a practice, such as behaviour, background or learned habits (Caldwell 2012).

Central to Schatzki's theory is the concept of 'site ontology', which examines 'the nature and basic structure of social life and social phenomena' (Schatzki 2005, p. 465). He further defines a 'site' as a 'mesh of practices and material arrangements' offering examples of practices like politics, education or even cooking (Schatzki 2005, p. 475). Within these sites, Schatzki defines material arrangements as objects set up within practices; materials being artefacts

that humans make use of such as a table or chair; or organisms defined as animals and non-living elements such as water or minerals.

When advising on the research of organisational practices, Schatzki (2005) recommends investigating 'nets' of practice bundle arrangements which can be identified within organisations and which may interact with each other such as the school office, classrooms, conference rooms or even the coffee machine. To explore nets of practice bundles Schatzki (2005, p. 746) recommends a methodology of participant observations, questioning and 'at least, ideally, attempting to learn participants' practices as means of gathering data.

Locating educational research based on Schatzki's theory proved elusive, particularly in the field of education. Loscher et al (2019) conclude that Schatzki's theory is still new to the study of organisations. Schatzki (2018, p. 162) himself concludes that practice theory cannot be applied to everything and that the starting point in recognising what can be analysed is to realise that practices provide merely a 'basic reality'. Moreover, one must recognise that there are plenty of other features of human life which are not part of practices, such as power, learning or experience. Schatzki (2018) argues further that the 'basic reality' of practices can be used instead to define and analyse other features of human life, such as power, learning or experience. Even though Schatzki's theory is central to the understanding of practice theory, its lack of application, particularly in the area of education and the apparent change in his own view of its application, is considered to be less suitable for this research.

While Schatzki (2017) discussed and defined the relationship between learning and practice theory, such as when defining learning as the acquisition of knowledge that precedes practices and not as a practice in itself, Kemmis (2014a) focussed specifically on practice theory as a tool for exploring various aspects of education and learning.

Kemmis

In advocating for the importance of practice theory, Kemmis (2021, p. 1) defines it as 'providing new ways to understand practice as crucial to human existence and coexistence'. In their influential book, Kemmis et al (2014a) argue that due to globalisation, education has changed in the 21st century as countries are able compete politically, economically and culturally. This is measured most notably through international league tables. As such, they define 21st century schools as being 'held in place by the combined effect of social practices' (Kemmis et al 2014a, p. 2).

In applying practice theory to education, Kemmis et al (2014a, p. 4) argue that people bring into organisations an understanding of each other through 'a lifetime inhabiting the social world' and a 'sophisticated processes of interpretation'. They also contend that individuals meet in pre-arranged 'intersubjective spaces' and, through this lifetime of inhabiting the social world, are able to negotiate intersubjective spaces through language, the material world and social relationships (Kemmis et al 2014a, p. 4).

Unlike Schatzki (2005), who argued that practices took place in fixed places at fixed times in 'sites', Kemmis et al (2014b) contend that the sites of practices are not abstract nor fixed, rather that the site of practices are influenced by historical and material factors that are relevant at the time. It is at this point that Kemmis et al (2014, p. 31) introduce their theory of practice architectures. In their definition of practices, Kemmis et al (2014, p. 34) focus on the relationship between 'practitioners' and the practice they are involved in through 'sayings' being the language of the practice, 'doings' as the engagement in activities, and 'relatings' as the relationship of people which 'hang together in projects'. These projects then 'act as the collective memory of the practice', which allows practices to be repeated (Figure 2.3).

Further to their practice theory, Kemmis et al (2014, p. 6) introduce the concept of *practice architectures* which provide 'mediated preconditions'

that can both enable and constrain practices. Conversely, practice architectures also provide supporting cultural, material and socio-cultural arrangements that help shape the sayings, doings and relatings leading to a practice. Unlike previous practice theories, Kemmis et al (2014a, p. 34) present a 'practice architecture'. They argue that this represents real-life practice, which is not abstract but illustrate what happens during a practice. They define this as the sayings, doings, and relatings adopted and used within the practice architecture arrangements (Figure 2.3).

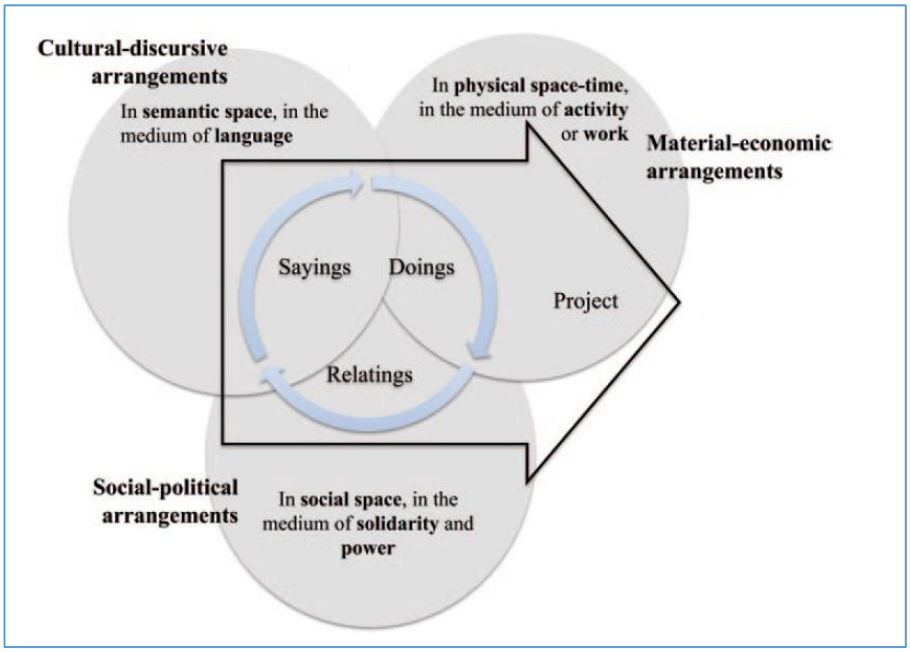

Figure 2.3 The practice architecture. (Kemmis et al 2014, p. 34)

Kemmis et al (2014) have applied their theory to various aspects of education, such as student mentoring, education for sustainability and classroom practices (Kemmis & Mutton 2012, Kemmis et al 2014b).

In applying Kemmis theory, Grootenboer (2017) explored the role of school middle leaders in enabling change within their schools using practice architectures. Therefore, a practical application of Kemmis' practice theory, particularly to education, is a clear possibility. However the focus of Kemmis' theory is mostly on the practice itself without the context of history or

culture of the organisation in which the practice is taking place. In order to understand the true impact of the CPT, the exploration of the context and parameters in which the CPT is operating is necessary. Therefore, this theory was considered to be unable to achieve the research objectives of the current study.

Engestrom

A further addition to the practice theory family which has gained popularity in the analysis of social structure and can provide a framework to analyse and explore workplace practices is Cultural Historical Activity Theory (CHAT). It has been applied to the field of education (Lee 2011, Postholm 2015, Trust 2016, Hancock & Miller 2017). Nicolini (2014, p. 114) describes CHAT as 'a unique and fundamental addition to the contemporary practice theory toolkit' and a theory which can theorise practice. Foot (2014) advocates that CHAT can allow for a systematic analysis of complex work practices which can include a range of aspects included in social research, such as psychological motives, power, culture and history as well as the implementation and mediation of the use of non-human tools. While Langemeyer & Roth (2006) argue that CHAT analysis allows for a non-reductionist approach to human activity in terms of conducting research, Hancock & Miller (2017, p. 938) point to the ability of CHAT to recognise the 'complex, interactional nature of fieldwork'.

Initially developed by Vygotsky, the first generation (1stGEN) of CHAT was based on the mediation of physical actions using both physical and psychological tools which 'functioned as a conductor of human influence on the object of activity' (Vygotsky & Cole 1981, p. 54). The second generation (2ndGEN) of CHAT was developed by Leontiev (2005) who, like Vygotsky grounded his work in Marxism (Roth & Lee 2007), focussed on the concept of activity systems resulting from the mediation between humans and tools and controlled by the actions of humans through the division of labour (Engestrom 1987, Hodkinson & Bloomer 2000, Engestrom 2014).

The third generation of CHAT (3rdGEN) was devised by Engestrom (1987), who sought to expand on the 1stGEN and 2ndGEN to include the interactions which take place in creating networks of activity systems. Similar to Giddens (1985), he put human agency centre stage (Avis 2007, Nussbaumer 2012, Spinuzzi 2020). In addition, Engestrom's 3rdGEN CHAT system also took cognisance of the cultural aspects of mediation, the environment and language in forming activity systems (Cole & Engestrom 2003).

3rdGEN CHAT acknowledges that all activity systems are networked and can be argued to constitute all of human society (Roth & Lee 2007). Engestrom (2001, p. 136) depicts a 3rdGEN CHAT model consisting of a minimum of two interacting 2ndGEN CHAT activity systems incorporating both the mediated physical actions of Vygotsky in the upper part of the triangle and Leontiev's division of labour in the lower part of the triangle (Avis 2009). The object of the activity system is represented as an oval to illustrate the instability of objects which can be uncertain and or subject to change (Engestrom 2001, Figure 2.4). Engestrom & Sannino (2020) argue further than to be defined as a 3rdGEN CHAT activity, the object must be partially shared by two interconnecting and interdependent CHAT activity systems.

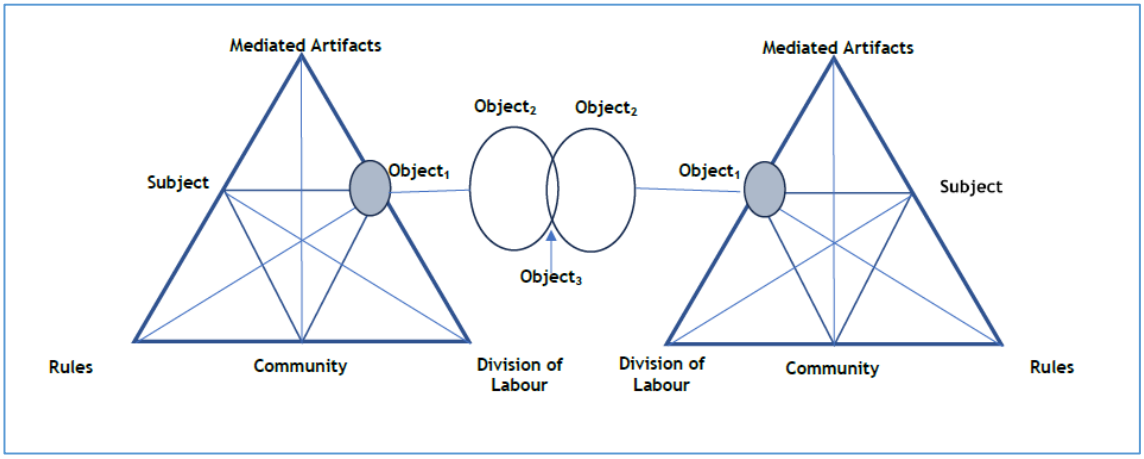

Figure 2.4 Two 2ndGEN CHAT systems as a 3rdGEN CHAT activity system (Engestrom 2001, p. 136)

3rdGEN CHAT has been described as a tool to explore organisations and work practices and has been used in a variety of fields, including education (Postholm 2014). Specifically, Postholm (2014) suggests that CHAT can be used in education research to explore the actions of teachers in schools.

Identifying aspects of teaching, such as pupil learning, can be mapped into a CHAT activity by exploring the mediation of objects such as pupil learning and development while using pupil tests and assignments as the defined tools of the activity.

3rdGEN CHAT has faced some criticism as being nothing more than an alteration of the first and second generations of the theory (Spinuzzi 2019). Rather, it is argued than the advancement to a 3rdGEN of CHAT exists in essence to address 'different problems in different fields' (Spinuzzi 2019, p. 6).

CHAT has become popular in recent times as an analytical tool in a variety of areas of education research. Cliff et al (2020) explored the 'unbundling' of higher education as a mediated activity, while Andrews et al (2019) explored four objects of school activity when investigating inclusive teaching. Hancock & Miller (2018, p. 951) used CHAT as a framework to explore inclusive education, concluding that 'CHAT had much to offer researchers' through the exploration of activity systems which can reveal contexts, influences, opportunities and challenges. Ultimately in an education context which relies on the dialectical relationships between ranges of people, CHAT provides a means of exploring these relationships and how goals are influenced within the context of the community in which these relationships operate (Trust 2017).

In taking a closer look at the structure of the CHAT activity system itself, Trust (2017) provides a clear definition of each of element within a typical CHAT activity system.

Objects - arise to meet a human need and can identify why people take various actions.

Subject - the people involved in the activity. As they perform the activity, knowledge and identities are changed.

Tools – these facilitate every human action and through their use can influence subjects who in turn may re-shape the tool to improve

effectiveness. Tools can be both physical, such as technology, or policies and psychological tools, such as teaching strategies.

Community – within an activity, this is the group of people who hold a shared interest in the object of the activity.

Division of Labour and Rules - since no individual can perform all tasks, the community negotiates individual roles based on knowledge and skills and the rules for participation in the activity.

In defining the requirements for a 3rdGen CHAT activity system, Engestrom (2001) describes five principles which he advises are necessary in depicting the relationship between two or more activity systems. In terms of the current research, I attempted to illustrate the curricular department in the Scottish secondary school as a possible CHAT activity to ascertain if a CHAT theoretical approach would be appropriate and could be undertaken (Table 2.1).

3rd GEN CHAT Principles	The curricular department as a potential CHAT activity system
1. The prime unit of analysis is a collective artefact-mediated and **object**-oriented system.	A curricular department led by the CPT.
2. An activity system is a community developed through the **division of labour**.	A curricular department within the school context.
3. The importance of the historical nature of the activity system is explored.	Analysis of the role of the CPT within the context of the school and Scottish education policy.
4. The role of 'contradictions' as the 'historically accumulated structured tensions' are explored.	The tensions and influence of historical factors in enacting the NIF policy by the curricular department level over time.
5. How activities can be transformed when the **object** and motive of the activity have changed.	The enactment by the department of the NIF policy over time.

Table 2.1 The curricular department as a possible CHAT activity

In considering these CHAT principles (Engestrom 2001), I was able to identify aspects of the curricular department which, with further analysis, could lead to potential CHAT activity. The CHAT elements described by Trust (2017) could also be seen within the text of the five principles which enlightened me to the ability to explore the practices within policy text and the practices of the CPT as two potential CHAT activities which could then be networked together as a 3rdGen activity system. This led me to the decision to adopt CHAT as the theoretical framework for this research to analyse the practices of the CPT within the cultural and historical contexts and the power of the NIF policy.

In the Scottish secondary school context, the CPT as a middle leader can be identified as having a wide range of responsibilities (Gurr 2018). This requires social interactions with a variety of stakeholders, such as teachers and senior leadership (Gurr & Drysdale 2013). Through the application of a CHAT theoretical framework, the social interactions of the CPT could be studied in the context of the parameters of enacting Scottish education policy in the school setting.

In advocating for the use of CHAT, Foot (2014) argues that CHAT can also allow for a systematic analysis of complex work practices which can include features common in social research, such as psychological motives, power, culture and history, as well as the implementation and mediation of the use of non-human tools such as tables, chairs or computers. Through the application of CHAT as a theoretical framework for this research, the practices of the CPT in raising attainment and the position of the CPT in education policy can now be explored.

2.13 Chapter Summary

The literature review sets the context for exploring the practices of the Scottish CPT in the middle leadership role, which has evolved over time to include the leadership necessary to support the improvement evident in Scottish education policy for schools in the 21st century. An exploration of how school improvement has globally developed into a crucial element of education policy with a clear emphasis on accountability was also discussed.

The importance in raising attainment in the Scottish context through the NIF policy and in how schools and teachers are involved in enacting the policy set the context for the exploration of practice theories.

In exploring a range of possible practice theoretical frameworks, Engestrom's CHAT theory stood out as the most appropriate for this research. In exploring the elements of CHAT, I reached the conclusion that using a CHAT theoretical

approach provided a systematic method and theoretical framework for exploring and analysing the relationships, resources, educational practices and historical and cultural factors (Nussbaumer 2012) which can shape the role and practices of the CPT, influenced by the NIF policy, in raising attainment. In addition, an exploration of the interconnectedness and interdependence (Engestrom & Sannino 2021) with the complex organisation can give context to the relationship between the NIF policy and the practices of the CPT to raising attainment.

Chapter 3 Methodological Approach

3. 1 Introduction to Chapter 3

The previous chapter established how the CPT has emerged in Scottish education as a middle leader with a wide range of roles necessary in managing and leading the Scottish education policy imperative for improvement, through raising attainment. This chapter now examines the methodological approach of this study by analysing a range of approaches in order to answer the research questions effectively. In addition, the research paradigm in which the research is to be situated is also considered. Establishing a methodological approach allowed me to consider both my subjective and objective stances, mindful of my own position as a currently serving CPT and now as a researcher.

3.2 Research Aim and Questions

The aim of this study is to explore the role and practices of the Curricular Principal Teacher in enacting the Scottish education policy of raising attainment using a theoretical framework. The research questions are:

1. Where and how is the CPT *positioned* in Scottish education policy?
2. How can CHAT analysis *explain* the *influence* of the policy of raising attainment on the *practices* of the CPT?

3.3 Methodological Approach

When deciding on a methodological approach it is important to ensure that the choice of approach addresses the context and purpose of the research question effectively (Nutbrown & Clough 2012). The starting point in deciding on a methodological approach is to understand the paradigm in which the current study is situated in terms of 'basic beliefs' and 'world view' (Guba & Lincoln P107, p. 35). Cresswell (2014, p. 35) argues that while the

philosophical world view of research is 'largely hidden' it remains influential and as such should be identified in any research study.

It is vital that both the philosophy and the paradigm underpinning any research should be 'explicitly stated' and that the paradigm and methods selected allow 'the aim and objectives of the study to be met and explicitly justify the reasons for the design of the study' McChesney and Aldridge (2019, p. 235). Cresswell (2014) cautions that the choice of paradigm in conjunction with other factors, such as the researcher's own beliefs, can ultimately influence the choice of research method used.

In referring to educational research specifically, Hammersley (2012) contends that a paradigm helps to define the philosophical assumptions about how the research phenomena are understood and ultimately define the purpose of the research itself. It is also notably argued that a paradigm provides an indication of the research community that a study aligns with and how knowledge should be pursued (Cohen et al 2018).

In choosing a paradigm, Guba & Lincoln (1994, p. 108) conclude that it should represent 'the most informed and sophisticated view that its proponents have been able to devise'. This theme resonates with the view of Biesta (in Coe, Waring Hedges & Arthur 2017, p. 159) that rather than looking at research paradigms first in order to formulate a methodology, the starting point should be 'driven by the aims, objectives and research questions'. The views of both Guba & Lincoln (1994) and Biesta (2017) have provided the framework in selecting a research methodology by basing any approach on the aims and research questions of the current study. I came to realise that while there is no perfect fit in terms of matching an approach to the study, as a researcher I must use 'judgement' (Hamersley 2012, p. 5) when making an informed and sophisticated choice that is driven by the 'context and purpose' of the study Nutbrown & Clough (2012, p. 21).

3.4 Research Paradigm

Having analysed the aim and purpose of the study in terms of the central role of the CPT in the the school and policy context and by reflecting it through my own beliefs (Cresswell 2014), the current study is clearly situated in the constructivist paradigm. The purpose of the study was to understand the CPT, who as the social actor is integral in the production of social phenomena. When investigating alternative paradigms, it became clear that a positivist approach would not be appropriate given the aim of positivism is to provide explanations through prediction and control (Guba & Lincoln 1994).

Constructivism, according to Crotty (1998, p. 42), 'is well removed from the objectivism found in the positivism stance'. This is the paradigm that resonated with my own world view that as human beings we interpret the social world through interaction and interpretation (Crotty 1998). This is evident from the aim of my research which was to explore the interactions and interpretations of the CPT in the social world of the school. Hammersley (2013) provides a supporting view that human knowledge and understanding occurs as a result of the active processes that humans use in making choices and constructing meaning in the social world rather than the positivist view, which will only accept physical behaviour and requires supporting evidence. Interestingly, Hammersley (2013) goes further, arguing that positivism is very close to empiricism and that the two are often interchangeable. In addition, in exploring the practices of the CPT, Guba and Lincoln (1994, p. 114) argue that a major 'mechanism' for gathering knowledge in the social world is dependent on the 'provision of vicarious experience'. Engagement with CPTs and their lived experiences will therefore be fundamental in gathering appropriate research data. Cresswell (2014) highlights how constructivism focusses on the processes of human interaction through social, cultural and historical settings and their norms. Given that these social, cultural and

historical settings and norms will be key elements used to investigate the social interactions of the CPT, it was clear to me that constructivism provides the most appropriate paradigm for the study (Nutbrown & Clough 2012).

3.5 My Positionality

Ontology focusses on reality and the nature of human beings' existence (Crotty 1998, Lee 2012). Guba & Lincoln (1994, p. 108) describe ontology, which they contend is what sets constructivism apart from other paradigms, in terms of what can be known about reality by asking questions such as 'how things really are?' or 'how things really work?'. Guba & Lincoln (1998) argue that only questions which relate to the 'real' of reality can be considered as opposed to questions addressing morals or aesthetics. Pring (2005, p. 210) conversely argues that there exist multiple social realities leading to research which focusses on multiple human perceptions of reality 'where one lot of perceptions is as good as another'. This may mean that I am challenged with interpreting and evaluating the socially constructed relationships of each participant and the individual realities which are created as a result.

In terms of ontology, Pring (2005) advocates against 'naïve realism', arguing that any culturally based reality must stand up to scrutiny of the facts. As such, there is a distinction between subjectivity and objectivity in research. Cohen et al (2018) concur, arguing that the personal understanding of the researcher means that objectivity is laid open to the subjectivity of the researcher. Conversely, Cohen et al (2018) argue that subjectivity cannot be ignorant of what exists in the outside world.

Constructivism can be argued as being both realist and relativist, which means that subjective meaning is constructed from the objective world. Therefore, subjectivity and objectivity become merged together (Crotty 1998). Rather than asking the question 'how things really are?', Crotty (1998) suggests that, from a relativist standpoint, the question would be 'how do we make sense of the way things are?'. This standpoint then allows the phenomena to be analysed both historically and culturally with the

understanding that interpretations of the same phenomena can be different according to their time and place. In conclusion, Crotty (1998, p. 64) concedes that 'we should accept that social constructionism is relativist'.

As a researcher, in exploring ontology it was clear to me that I must be cognisant when adopting a constructivist paradigm that addresses both objectivity and subjectivity, particularly in terms of my own beliefs and understandings as a practicing CPT and the beliefs and understandings expressed by other CPTs.

I concur with Crotty (1998) that constructivism requires a relativist ontology and that this is appropriate for the current study. CPTs may interpret the reality of how educational objectives and education policy are enacted within their schools and within their own departments in different ways, due to how cultural and historical factors can vary within each school or catchment area. As such, being cognisant of the subjective views of the CPTs against the objective reality of the school aims and government education policies can be analysed effectively through adopting a relativist ontology.

Epistemology

The relationship between the researcher and participants can be described as transactional in a constructivist paradigm (Guba & Lincoln 1998). As such, findings are 'literally created' from the investigation, meaning the distinction between ontology and epistemology, according to Guba & Lincoln (1998, p. 111), 'disappears'.

In terms of the current research, this appeared to me to be an inescapable truth. The researcher is integral in the production of research data and the subsequent findings, particularly in my position as a CPT. I was not in agreement with Guba & Lincoln (1994) that ontology and epistemology disappeared in the constructivist paradigm; rather, the distinction between a relativist ontology and an interpretivist epistemology allowed me to clearly define the need to be aware of the duality of the researcher/participant relationship and the subjective/objective issues that surround that

relationship. This awareness allowed me to analyse more deeply and draw conclusions from the participants' responses that may not be possible if the researcher was from outside the role of CPT.

Without a clear understanding of how people interpret and make sense of the world they live in, there can be no understanding of why people act as they do or even why institutions exist at all Hammersley (2013). As such, objectivity cannot be achieved; rather, the researcher must draw on their own social experience. Neuman (2014) concurs that in order for social science knowledge to be created, the researcher must simultaneously reflect and interpret both on their own experience as well as that of their participants. It was clear to me therefore an interpretivist epistemological approach would allow my social experience as a CPT to be drawn upon when investigating the human experience and analysis of the phenomenological experiences of the participants.

An interpretivist approach can yield 'surprising findings' which can be analysed on three possible levels (Bryman 2012, p. 31). Interpretations are placed first in the social science context, secondly in the context of the concepts and theories of the discipline being researched, and thirdly, the researcher then explains the participants' interpretations. Adopting an interpretivist approach ensured that interpretations of research data could be analysed in the most appropriate context (Neuman 2014).

Collecting evidence in educational research can be eclectic and can include scientific data in addition to human perception or historical or psychological data (Pring 2005). However, the way in which different types of data are interpreted and used is dependent on the situation and the educational judgements being made. This leads me to consider the issue of truth and values surrounding the issue of gathering data from participants.

In defining constructivism, Neuman and Gutterman (2016, p. 361) argue that the constructivist world is based on the constructs of the human brain, therefore 'there is no truth that can be disconnected from the person that

perceives it'. In terms of collecting data from participants based on 'truths' and how participants perceive their world the issue of values is important. Guba & Lincoln (1994, p. 114) contend that values have 'pride of place' in a constructivist paradigm in shaping the inquiry itself as well as highlighting the power dynamic between the researcher as the orchestrator and the potential for more vulnerable participants. While participants in the study are not defined as vulnerable, it must be acknowledged that as a CPT with 22 years' experience, there could still be a power dynamic between less experienced CPTs or even CPTs known to me who may view me as more senior.

Reflexivity

Researchers must ensure rigour and quality when conducting research (Dodgson 2019). As a currently serving CPT who would be interviewing CPT colleagues from a range of schools, I was acutely aware of my researcher position and the possible impact of my shared experiences at the interview stage of the study with CPT participants (Dodgson 2019). Therefore, it was essential to recognise and utilise reflexivity as a methodological tool which allowed me to identify reflexive instances throughout the interviewing stage, in particular, and also my role in creating knowledge generated from the interview responses. The knowledge I created had to recognise the potential influence of my own lived experiences as a CPT (Subramani 2019).

The issue of values highlighted to me the importance of the researcher in understanding the power of the position occupied in terms of ensuring that participants are treated equally and fairly and in my role as researcher being aware of the potential influence of my own values, or as Bryman (2012, p. 39) puts it, ensuring 'no untrammelled incursion of values'. The potential challenge here could be hearing points of view from CPTs that do not fit with my own values, resulting in unconscious bias. To mitigate this possibility, Bryman (2012) suggests maintaining an interview style which does not unduly influence participant responses, which was achieved by ensuring that the interview schedule was closely adhered to for all participants.

Given that there are a limited number of CPTs, there is an increased chance that the participants may be known to me, which may result in participants feeling under pressure to 'say the right thing'. I was aware of the implications of knowing participants and that I should put participants at ease to facilitate honest responses. This was done expressing to participants that all responses were confidential and anonymised and that there was no right or wrong answer. It must be acknowledged that it is my knowledge and experience as a CPT that would allow judgements to be made on the data collected (Cohen et al 2018).

As a CPT with 27 years of teaching experience and 22 years as a CPT, I realised that there may be CPTs whose methods and views conflicted with mine and who could also be less experienced, potentially leading to a perceived power imbalance. Cresswell (2014) offers advice to avoid the implications of a power imbalance by discussing the purpose of the study with participants, elaborating on the way data will be used, and ensuring that there are no leading questions. In addition, I was aware of the importance of not sharing any personal ideas or impressions. This could be achieved by keeping a diary of the CPT interviews and reflecting on how interviews were conducted.

Making clear the rationale for the selection of participants at the interview stage and who the researcher is in relation to the selected participants is suggested by Dodgson (2019). Berger (2015) also advises that the researcher should also be aware of their own reactions to the responses of participants.

3.6 Methodology

Methodology is the design which leads to the choice and use of methods resulting in fulfilment of the research outcome (Crotty 1998). The researcher must ensure that there is a rigorous and clear research design which can be linked to the research questions and purpose of the research (Crotty 1998, Cohen et al 2018). Nutbrown & Clough (2013) advise that the selection of research methods should depend on the phenomena and the circumstances

being investigated and warn against adopting techniques from other research when these clearly will have been the subject of quite different phenomena and circumstances.

In exploring a range of qualitative research definitions, Hammersley (2012, p. 3) concludes that trying to provide a definitive set of qualitative features is ‘a hopeless venture’ given the range of methods that are used in legitimate qualitative research studies. Bryman (2012) defines qualitative research simply as using words more than quantification. Hammersely (2012, p. 9) chooses to muddy the waters further in defining qualitative research as covering a ‘heterogenous field’ of documentation which can provide research data. In defining quantitative research, Bryman (2012) describes the use of numerical data collection, the relationship with theory, and the association with positivism. In his definition, Hamersley (2012) describes a commitment of quantitative research to hypothesis testing, generalisability and the control of variables. A similarity can be further drawn between qualitative and qualitative research in that both methodologies look to link research data to concepts and ideas and that it is only the method of measurement used which differs (Neuman 2016).

A further possibility would be to adopt a mixed methods approach using both qualitative and quantitative methods. Johnson & Owuegbuzie (2004, p. 15) advocate for a mixed methods approach as a ‘non-purist’ approach, which allows researchers the ability to ‘mix and match’ techniques in order to answer research questions effectively. Blake (2018) suggests that mixed methods provide a means to avoid the traditional realist versus relativist dichotomy. Lund (2011) argues that by using a mixed methods approach, the disadvantages of both qualitative and quantitative methods can be avoided and that it offers advantages, such as the ability to explore more complex phenomena or to even provide conflicting data which can then lead to further reflection.

Given the constructivist and interpretivist stances of the methodological approach of current study based on the lived experiences of the CPT in the Scottish education policy context, this study will be broadly qualitative research (Bryman 2012). I also drew confidence from the view of Hammersley (2012) that qualitative research is not so easily defined and as such can include a variety of data sources.

While I would argue this study does not adopt a mixed methods approach per se, the primary data collection plan consisted of a Likert scale participant online survey and a semi-structured interview. The online survey offered the opportunity to ask closed questions, providing useful quantitative data for further reflection (Lund 2012). In addition, this study also explored Scottish education policy; therefore, a critical policy analysis of the NIF policy document was undertaken. The interview phase allowed qualitative data to be gathered, revealing the lived experiences of CPTs in carrying out their practices in raising attainment. The data gathered would then be coded, allowing CHAT theory to be applied as the theoretical framework.

3.7 Research Design

Determining the research design of a study is informed by both the purpose of the research and the phenomena evident within the research question (Cohen et al 2018). Determining a research design can also be achieved by thinking about how the research study will be carried out in practice (Berg 2002). Choosing the most appropriate research design leads to the systematic collection of empirical data, meaning the social phenomena within the study can be better understood and explained (Neuman 2014).

The constructivist paradigm and the qualitative approach chosen for this study supports the planning of both the research design and how the research will be conducted (Cohen et al 2018). As a starting point, the research questions were used to allow me to build a picture of the type of factors that could help devise the most appropriate research design (Cohen et al 2018) (Table 3.1). An awareness of these factors allowed me to think about the

type of research tool that would best collect the type of data relevant to each research question.

Research Question	Factors
1. **Where and how is the CPT *positioned* in Scottish education policy?**	• Examining documents • Political rhetoric • Expressions of a point of view that are taken for granted and unquestioned. (Atkins & Wallace 2012) • Participants' perception of CPT role
2. **How can CHAT analysis *explain* the *influence* of the policy of raising attainment on the *practices* of the CPT?**	• Collecting data in the participants' setting. • Researcher's interpretation of the meaning of the data collected. • Verbal interactions (Atkins & Wallace 2012) • Learning the meanings that participants give about a problem, not what the researcher thinks. • Reflexivity. • Researchers' understanding of the application of CHAT • Holistic approach which examines multiple perspectives Cresswell (2014)

Table 3.1 Factors informing the research design.

The research design of this study was also informed by the CHAT theoretical framework, which provided a theoretical approach to the practices of the CPT. Nussbaumer (2012) argues that the use of CHAT employs units of analysis, which can explain relationships. Further, by using the signs and tools of CHAT, the relationships between components can be used to uncover contextual influences. Miles (2020, p. 66) concurs and argues that rather than CHAT being too complex and difficult to understand, it 'provides a ready language and toolkit for the design of research'. Similarly, Yamagata-Lynch

(2010) advocates for the use of CHAT in qualitative research, which allows the researcher not only to develop an effective research design but also provides a systematic means of understanding the complex human relationships within complex real-world scenarios.

Crucially, the CHAT framework means that any tensions and contradictions within the context of the Scottish education system in which the CPT operates could be explored and investigated, allowing the research questions to be answered more effectively (Yamagata-Lynch 2010).

Critical Policy Analysis – The National Improvement Framework

The first step in gathering the data was to address Research Question 1 (Ch1, p.14) by critically analysing the Scottish Government flagship NIF education policy, which was and remains the education policy at the heart of the responsibility that the CPT has for raising attainment.

Critical policy analysis for this study explored the changes made to the NIF policy in 2021 compared to the original policy from 2016. This would provide the opportunity to explore the 'political rhetoric and practical reality' of the policy that has changed over time (Young & Diem 2018, p. 4).

Critical policy analysis (CPA) has been in use since the 1980s as a research tool which can conceptualise the link between global and national policies and describe how these policies are practiced in schools (Rata 2014). Diem & Young (2017, p. 79) describe CPA as viewing 'policy as something to be critiqued or troubled, rather than be accepted at face value'. They argue that policy analysis has moved away from analysing the goal driven implementation of policy and its impact steeped in the positivist approach, to a framework which attempts to understand the complex nature of policy and how policy can develop over time.

In terms of defining methodology, Diem & Young (2017) express the importance of theorising as a means of helping to identify the research

problem and how the researcher uses this theoretical perspective to make judgements on the data important enough to be attended to. In their view, it is important for the CPA researcher to carefully define the theoretical perspectives that influence methodology. Given that CHAT is the theoretical perspective being used in this research, as the researcher I paid close attention to how CHAT influenced the critical policy analysis undertaken, which provided a thread which led through to the interview stage of the research and influenced the interview questions.

In thinking about how to conduct CPA, Diem & Young (2017, p. 4) provide a range of 'critical concerns' which demonstrate how policy has come to be explored more recently by policy researchers. These critical concerns include the differences between policy rhetoric and practice, where policy is rooted and how it develops over time, as well as the distribution of power, resources and knowledge which can impact on the creation of 'winners or losers' in the system. These critical concerns will help form the basis of my analysis of the NIF policy document.

Diem et al (2014, p. 1083) conclude that CPA can be defined both as a way to explore the subjective and complex nature of policy and also to explore the 'intended and unintended consequences of the policy implementation process'. Therefore, through an analysis of the NIF policy using a critical framework, the relationship between policy and how the policy influenced the practices of the CPT were examined.

CHAT Analysis of the National Improvement Framework (NIF) Policy

In order to position the CPT within the context of the NIF policy, it was clear to me that a relationship between the CPT and the NIF policy existed and required further investigation. Exploring this relationship allowed me to illustrate the NIF policy as a 2ndGEN CHAT activity which represented both the individual (the CPT) and group actions (policy enactment) (Engestrom 2001). Conducting this CHAT analysis further enhanced the depth of the interview questions I was able to pose and also provided me with a clearer understanding of the relationship between the NIF policy and CPT within the

scope of the potential to network two 2ndGEN activity systems as a 3rdGEN activity system. In conducting the CHAT analysis, the adopted research framework was based on the approach implemented by Trust (2017), who had explored the teacher as an individual within a group action of sharing knowledge.

Online Survey

The use of an online survey allowed for an exploration of Research Question 1 by examining the relationship between the GTCS Standards for Middle Leadership (GTCS 2021a) and the lived experience of the CPTs. It did so by asking participants to rate their confidence in meeting the Standards for Middle Leadership. The GTCS having already provided a 'self-evaluation-wheel' for middle leaders gave me a ready means of exploring the confidence of the CPT in recognising their own middle leadership practices within the GTCS standards (GTCS 2021c), (Figure 3.1).

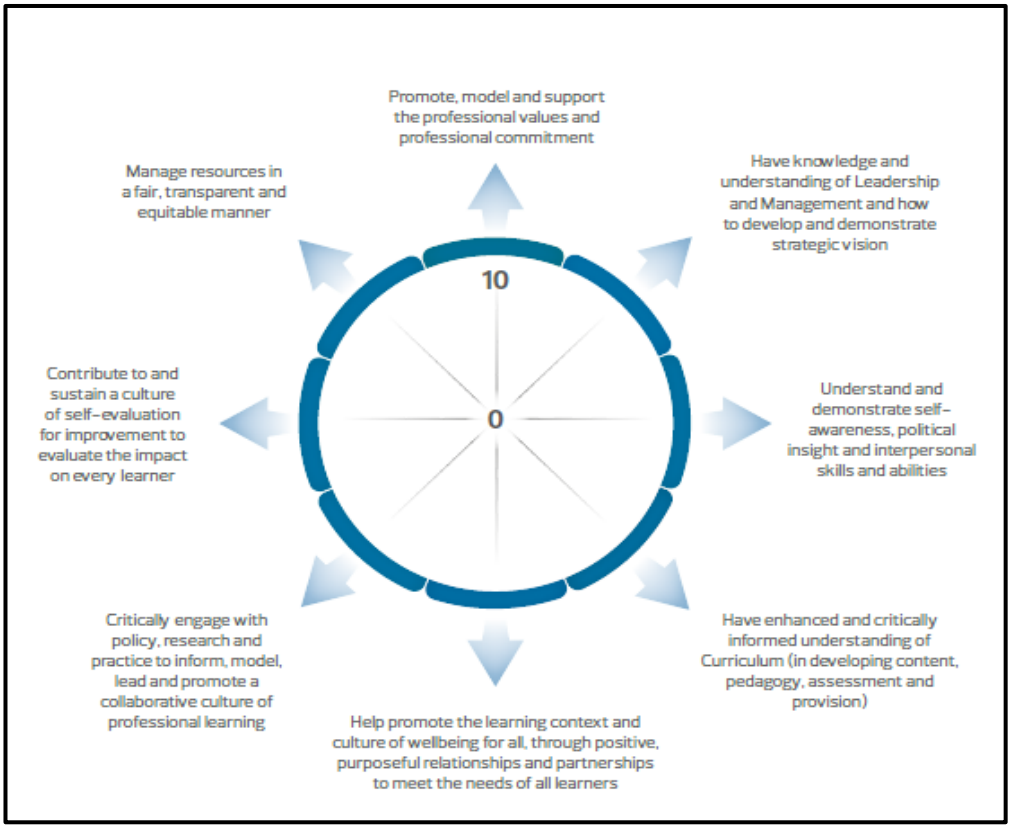

Figure 3.1 Middle Leadership Self Evaluation Wheel (GTCS 2021c)

Quantitative data was gathered using same Likert Scale as the GTCS Evaluation Wheel (GTCS 2021c) (Appendix 1). This also meant that any questions relating to generic middle leadership issues were omitted from the interview process, leaving more time to concentrate on gathering rich, in-depth data. A survey also had the benefit of eliminating social desirability bias, where participants could give responses seen as being the correct ones rather than what the participant feels or believes (Bryman 2012).

The survey has also been described as the research tool which allows data to be gathered at a specific point in time and which can reveal relationships and the conditions in which these relationships exist (Cohen et al 2018). Furthermore, surveys have the benefit of being able to target a wide range of the population while allowing data to be gathered simultaneously. However, responses to surveys can be low and responses given may be invalid or suffer from bias (Cohen et al 2018).

In order for a survey to be successful in gathering accurate and useable data, cognisance should be paid to the design of the survey. This can be ensured through the simplicity and conciseness of the survey questions so that participants are not overloaded with too much information (Cohen 2018).

The task of reaching a large section of an identified population can be achieved using online surveys. The ability to reach participants using the Internet has led to a rise in the use of the online survey (Bryman 2012). Using an online format grants the researcher the opportunity to use a variety of formats and styles to the survey and also to be able to filter questions (Bryman 2012). In using an online survey for the current study, filter questions could be used to ensure that participants read and give their consent before taking part.

While Bryman (2012) points out that the use of online surveys requires expertise in engaging with software, the use of the university online software survey tool Qualtrics for this research was a straightforward process and allowed me to word process the survey questions, apply a Likert scale, and

then publish the survey via a link on Twitter and email (Appendix 2). The results of the survey were then downloaded to an Excel spreadsheet for analysis.

In deciding how to question participants using of the same Likert scale evident in the GTCS Self Evaluation Wheel meant that the data I gathered was based on the middle leadership standards defined by the GTCS and closely associated with the teacher and practitioner professionalism associated with the NIF policy. The Likert scale allows respondents to rank their agreement with statements (Bell 2003) that have a semantically different adjective at each end of the rating scale, such as 'feel very confident' and 'not very confident' (Cohen et al 2018). For this study, I decided to use a 10-point Likert scale to mimic the scale of the GTCS Evaluation Wheel (GTCS 2021c).

Caution must be taken in deciding what the scales will be as well as what they mean in order to ensure that meaningful data is gathered (Bell 2003). The researcher must also be aware of the level of subtlety and sensitivity they attach to the results (Cohen et al 2018). Bell (2003) concedes that Likert scales can result in gathering useful data so long as the instructions to participants are clear in what they are being asked to do. Cohen et al (2018, p. 481) suggested that a rating scale such as the Likert scale allows the researcher to 'fuse measurement with opinion, quality and quantity'.

Social Media as a Tool to Recruit Participants

For this research, offline email invitations containing a link to the Qualtics survey was sent to wide range of colleagues known to me. Recruitment also used the online social media platform, Twitter. A tweet containing the same link to the Qualtrics survey as the offline email was used to invite users from appropriate Twitter groups and my own followers (Appendix 2).

The use of social media as a tool to recruit participants is becoming increasingly popular at a time when research can be cancelled altogether due to a lack of participants (Gelinas et al 2017). Frandsen et al (2016) point

out that while participants may be attracted to a study, the effectiveness of social media in ensuring that the participants are of the right type can be called into question. It is also possible that the use of social media can result in an improved recruitment rates of participants (Shere et al 2014). I hoped that by using social media I would be able to widen the potential number of participants as far as possible.

Interviews

In preparation for the interview stage, Bryman (2012, p. 473) suggests considering puzzling elements about the research topic. Through exploring 'puzzlement', effective research questions can be formulated. Having conducted the critical policy analysis of the NIF policy document and undertaken a CHAT analysis of the NIF policy and online survey, my puzzlement lay in wondering how CPTs would verbalise their confidence in their leadership and managerial roles and their positioning in education policy. In essence, these puzzlements would allow me to gather further data with which to answer Research Question 1 – Where and how is the CPT *positioned* in education policy?

Formulating the interview schedule involves taking the study objectives and the research questions and framing these as interview questions (Cohen et al 2018). The data already gathered from the CPT survey, critical policy analysis, and CHAT analysis of the NIF policy gave me confidence that I would be able to develop interview questions which would allow me to further explore the research questions effectively.

I realised I could further explore Research Question 1 at the interview stage by formulating questions based on the descriptions of leadership and management as defined by the GTCS Standards for Middle Leadership (GTCS 2021a). These questions allowed me to further investigate how the CPTs are positioned in education policy by establishing if CPTs recognised the GTCS standards within their own practice and to what extent.

In answering Research Question 2 – How can CHAT analysis explain the influence of the policy of raising attainment on the practices of the CPT?, I took the decision to frame each of the interview questions within the context of the elements of a CHAT activity (Trust 2017). Undertaking a CHAT analysis of the NIF policy gave me confidence in developing an understanding of the potential data which could be generated at the interview stage and which could then also be represented as a 2ndGEN CHAT activity. This approach would provide me with a clear focus when developing the theoretical CHAT framework of the CPT practice of raising attainment and the influence and position of the CPT in education policy. This approach would also allow me to conduct ongoing analysis as advocated by Miles & Huberman (1994) during the data collection process, providing a means of corrective action if necessary.

The format of the interview questions and the mode of response from participants should be considered (Cohen et al 2018). Cohen et al (2018) provide a list of factors to consider when thinking about the interview questions, such as the participants' level of understanding, the relationship of the interviewer with the participant, and the interviewer's insight. As the interviewer, while I was conscious of my position as a CPT – meaning I would likely be interviewing familiar colleagues – I also realised that possessing a high degree of insight into the CPT role meant I could carefully frame the interview questions in such a way that I was confident CPTs would understand what the questions were asking of them.

The effectiveness of a question should be considered in terms of whether the question is doing its job in producing reliable and measurable data that is worthy of discussion (Bickman & Rog 2009). The type of questions being asked also has a direct impact on the mode of response from the participant (Bryman 2012).

Clearly thought out, standardised, and open-ended questions based on the elements of a CHAT activity allowed me to ask participants identical questions in sequence, meaning that the data gathered was comparable

between participants at the data analysis stage. The use of standardised questions also increased validity and reduced the potential for interviewer bias (Cohen et al 2018). As a CPT, I was aware of possibly and unduly influencing participants through my own opinions or preconceived views (Cohen et al 2018). By using standardised questions, I reduced my own opportunity to express any of my own theories or attitudes.

Interviews with CPTs

To investigate Research Question 2 - the practice of the CPT in raising attainment, a qualitative approach was adopted, which considers participants as central to the generation of knowledge (Cohen et al 2018). A widely used method of gathering qualitative data is the interview, regarded as a 'social, interpersonal encounter' which has a clear focus on the social situation in which data is collected (Cohen et al 2018, p.506). Bryman (2012) describes the interview as a means of gathering a variety of data such as behaviours, norms, attitudes, beliefs and values (Bryman 2012).

Interviewing is the most commonly used data gathering technique in social sciences (Briggs et al 2014). While data is clearly being gathered, the interview can also be regarded as a social interaction highlighting the human element of the system being investigated (Cohen et al 2018). The interview can also provide data related to norms, attitudes, values and beliefs within the environment under investigation (Bryman 2012). Yamagata-Lynch (2010 p. 70) argues for the use of interviews, with particular reference to activity theory, in that they can yield information relating to 'the subject, existing or lacking tools and the subject's perspectives about the object'. Cresswell (2014) cautions that interviews can face problems such as interviewer bias or participants who interpret questions differently and give responses which are subject to being filtered through their own experiences. These issues were mitigated by the inclusion of standardised prompts for each question to ensure that each participant was treated, as far as possible, in an identical manner.

The purpose of the interview has a direct bearing on which type of interview is appropriate (Cohen et al 2018). Both structured and semi-structured interview techniques were considered. In deciding on an interview approach, for the current study it appeared that the structured interview tended to result in questions prepared in advance, answered in the same order for all participants and providing little opportunity for manoeuvring by either the interviewer or the participant (Hobson & Townsend 2010). Given that the current study focusses on the practices of the CPT, I wanted to give participants some freedom of expression and free thinking. A semi-structured interview approach allowed me to concentrate on specific areas pertinent to the issues being investigated, while also allowing participants the opportunity to give more detailed responses (Bryman 2012).

In terms of the questions posed during the semi-structured interview, cognisance was taken of the theoretical structure of CHAT, the NIF critical policy analysis, and the CPT online survey of the GTCS Standards for Middle Leadership already conducted.

In order to analyse an activity using CHAT analysis, Mwanza (2002) developed an Eight-Step-Model (Figure 3.2) based on the components of Engestrom's CHAT activity triangle (Engestrom, 1987, as cited in Mowanza 2002) (Figure 3.3). She suggests this can be used as a tool to assist in the formulation of interview questions.

Activity System component	Questions to ask.
Activity	What sort of activity am I interested in?
Objective	Why is this activity taking place?
Subjects	Who is involved in carrying out this activity?
Tools	By what means are the subjects carrying out this activity?
Rules and Regulations	Are there any cultural norms, rules and regulations governing the performance of this activity?
Division of Labour	Who is responsible for what roles when carrying out this activity and how are roles organised?
Community	What is the environment in which the activity is carried out?

Figure 3.2 Eight-Step-Model (Mwanza 2002)

By using the Eight-Step-Model, the activities and the practices of the CPT being investigated can be interpreted and questions can be adapted. This allows the components of the activity to be operationalised, thus allowing relevant data to be collected (Mwanza 2002). Mwanza's (2002) model provided some guidance on the structure of the questions which addressed the activities that the CPT engaged in, how the CPTs delegated responsibilities, and the views of the CPT about their practices in achieving the outcome of raising attainment.

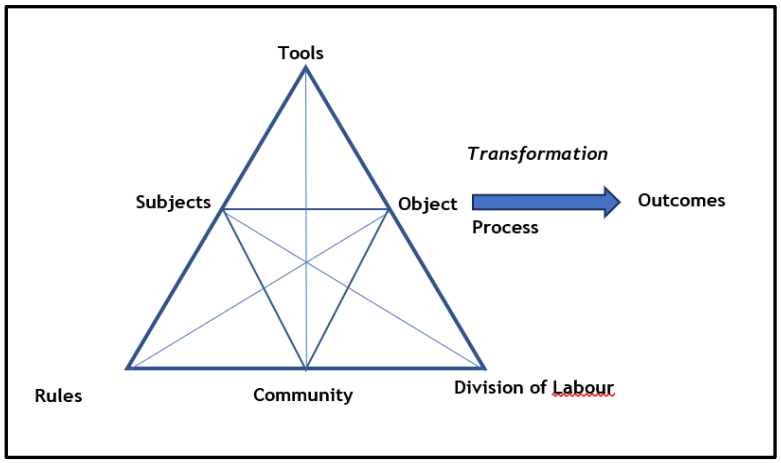

Figure 3.3 CHAT Activity System (Engestrom, 1987, as cited in Mwanza 2002)

Studying Mwanza's (2002) model allowed me to think clearly about the relationship between the CPT and their practices in raising attainment and to construct the interview in such a way that the questions were grouped to

reveal the practices of the CPT. This would allow the practices of the CPT to be viewed through the lens of the elements of a CHAT activity (Mwanza 2002). This did not mean that Mwanza's (2002) questions were used verbatim, but that they were refined by me for the purposes of this study.

Target Population

The target population must be identified and clearly defined when conducting a survey (Best 2012). The target population for this research were all CPTs in Scottish secondary schools who, as is the case with all middle leaders in Scottish schools, are expected to be both cognisant of the GTCS Standards for Middle Leadership (GTCS 2021a) and practice their roles according to these standards. The identified target population would give a clear indication of the confidence of the CPT in applying the GTCS Standards for Middle Leadership in line with their own lived experience in carrying their middle leadership role.

In Scotland, there were on average 15 middle leaders in each of the 345 secondary schools (Principal Teachers and Faculty Heads [Secondary Schools] 2022). This figure also included non-curricular principal teachers, such as Principal Teachers of Pupil Support, Learning Support, and other generic promoted posts. Given the number of curricular subjects within a Scottish secondary school, I conservatively estimated 10 CPTs per secondary school. Therefore, I estimated the total population of CPTs in Scotland would be around the figure of 3570.

Sampling of Participants

In social science research, convenience sampling is a common approach (Winton & Sabol 2021). Like attracting participants to the online survey for the study, attracting participants to take part in the interview stage relies on the willingness of the targeted population to get involved and their availability (Bell & Waters 2018). As such, I relied on convenience sampling by turning to the participants who had taken part in the online survey and supplied their email addresses, in addition to colleagues whom I knew to

have completed the survey. Using this method, I was able to sample 12 participants across five schools within two local authorities and nine different curricular areas consisting of eight female participants and four male participants and their years of experience as CPTs (Table 3.2).

Participant Pseudonyms	Curricular Area	CPT Experience (years)
Kim	Business Education & Computing	1
James	Physical Education	3
Debbie H	Business Education & Computing	4
Jenny	Modern Languages	1
Andrew	Business Education, Computing & Technical	4
Nicola	Social Subjects	9
Angela	Maths	3
Rob	Religious and Moral Philosophy Studies	4
Debbie M	Chemistry	5
Jaime	Physics	8
Caroline	Biology	6
Lauren	Performing Arts (Music & Drama)	15

Table 3.2 Participant Sample

The sample size of 12 allowed me to analyse the participants' collective voice while still being able to closely analyse each individual response (Robinson 2013). I consciously sampled CPTs from a range of curricular areas, which gave me the opportunity to explore potential similarities or differences in the practices of the CPTs. This also resulted in participants with various lengths of service as CPTs. In terms of sample size, Cohen et al (2018) argue that a robust theoretical framework, such as the CHAT framework in this study, exploring the phenomena under investigation can in fact give rise to a greater degree of generalisability. The pilot interview participant was not part of the sample of 12 participants in the study.

Pilot Interview

Conducting a pilot interview can not only alert the researcher to any potential issues but also provides an opportunity to gain experience in the interview process (Bryman 2012). Bell & Waters (2018) suggest piloting a draft interview schedule and then redrafting and considering any comments from the pilot participant. Conducting a pilot interview also allowed me to practice conducting interviews using Microsoft Teams, which allows video conferencing and for meetings to be recorded and transcribed into Microsoft Word documents.

An interview schedule was prepared and a pilot interview conducted with a member of my department who had just been successful in gaining a CPT post in another local authority. While limited in experience, I was confident that in preparing for the CPT interview process, she would be well-versed in the expectations of the post and would understand what the questions were being asked of her.

The pilot interview was conducted on Microsoft Teams and the recording and transcription was successful. I found the files easily and imported them into Nvivo. The wording of the questions was deemed appropriate and elicited responses that would provide the data required to answer Research Question 2. Furthermore, in discussion with the pilot participant post interview, the understanding of one question resulted in a slight change to the wording. The successful wording of the questions was in part due to the experience of my own role as a CPT and as such being able to reflect on how the wording would be interpreted as a participant.

For the pilot interview I also supplied the participant with a copy of the questions in the hope this would provoke thought and give the participant some idea of what to expect. This was subsequently reviewed to avoid CPTs feeling pressured to prepare anything in advance and was replaced instead with several generic points for discussion (Appendix 3). The pilot interview did not form part of the reported interview data.

The Interview Process

The interview process took place via Teams over a four-week period. I decided to use Teams as all teaching staff were familiar with and had access to Teams via the Scottish Schools GLOW network. This also meant that no travelling was required. I was able to contact CPTs via email and give them the times I was available for interviews, allowing them to choose a time. I then emailed the participants a consent form and information sheet and created meetings in Teams. This process worked very efficiently and meant that interviews were conducted over a very short period of time. The other benefit of using Teams as a tool to conduct interviews meant that the interviews could be recorded and a transcript would be downloaded as a Word document.

At the beginning of the interview process, I reflected on my own reactions to participants' responses. I developed a strategy of avoiding any confirmatory comments after participant responses and ensured I simply thanked the participant for their response and moved onto the next question. There was no need to use prompts in any of the interviews conducted which further ensured the integrity of the data being gathered.

As the participants came from a range of subjects, including Performing Arts, Maths, Chemistry and Physical Education. Having no experience in these subject areas further reduced any potential bias to participant responses with regard to the potential for interviewer bias as described by Bryman (2012).

Theoretical Framework used for Interview Data Analysis

Qualitative data is analysed to establish relationships, beliefs and categories, which allows the researcher to discover the participant's view on a subject and their world view (Basit 2003). The research framework, which emerged to establish relationships, beliefs and categories, began with my decision to apply a descriptive coding system to the interview data. This would allow sections of text to be attributed to a particular phenomenon (Miles &

Huberman 1994). The particular phenomena for this study were the elements of a CHAT activity. Taking the decision to base each interview question on an element of a CHAT activity (Appendix 4) meant that I was able to identify and categorise the practices of each participant in a systematic way, which I hoped would lead to a theoretical analysis and construction of a 2nd Gen CHAT activity system depicting the practices of the CPT in raising attainment.

Coding of Data

Given that coding was used as part of the data analysis process, I recognised the potential influence of grounded theory in the analysis process. However, given that grounded theory relies particularly on theory which emerges from data analysis (Bryman 2012), as opposed to testing data against a pre-existing theory to discover if the theory can be confirmed (Cohen et al 2018), I disregarded any further influence of grounded theory as the data was tested against the pre-existing theory of CHAT.

Coding can be described as a 'heuristic device' (Basit (2003, p.144), which allows the researcher to reach beyond the data and understand how participants view the world. The use of coding, which can include words, phrases or paragraphs (Basit 2003) is widely accepted as a general approach to the analysis of qualitative data (Bryman 2012).

Coding using Nvivo

Coding plays an important role in analysing data (Basit 2003) and is required to make sense of unstructured data such as interview responses (Bryman 2012). The analysis of the interview data was deductive, meaning the data were collected in relation to the concepts of CHAT theory. The qualitative interview data were coded through allocating to a variable (Bryman 2012) and in the case of this study those variables were the CHAT components. The interview data collected being based on the components of a CHAT activity meant that there was clarity in replicating the CHAT components used to formulate the interview questions as the descriptive codes in Nvivo. The use

of descriptive codes in Nvivo then allowed the interview data to be defined, separated, and compared (Mruck & Mey 2007).

Manual coding was discounted as it can be time consuming and tedious while the use of computerised coding can result in more efficient analysis (Basit 2003), in addition to allowing several files to be collated into one (Cohen et al 2018). By using the coding system in NVivo I was able to generate Coding Summary Reports for each CHAT element code (Appendix 5). In addition, 2 further Coding Summary Reports were generated to explore further how the CPT was positioned in education policy in terms of the GTCS definitions of both leadership and management (GTCS 2021a).

The Coding Summary reports allowed me to both contextualise the interview transcripts (Basit 2003) and adopt the same analytical approach that was taken to explore the NIF policy document and generate a 2ndGEN CHAT activity diagram of the practices of the CPT. This approach ultimately meant that a CHAT activity generated for the CPT then became the 'primary unit of analysis' (Trust 2017, p. 100) in the theoretical exploration of the CPT practices used to raise attainment. In addition, the initial coding process then allowed for identification of themes (Cohen et al 2018).

Constructing Themes

In asking the question 'So what is a Theme?', Mishra & Day (2022, p. 187) define a theme as 'abstract and subtle expressions/patterns/processes that explain a phenomenon'. They argue further that themes can sometimes be confused with codes and that themes are generally discovered during the data analysis stage.

In providing a transparent understanding of how themes are constructed from inductive research, Gioia et al (2012, p.20) suggest a graphical representation in the form of a 'data structure' that depicts how themes have been constructed or, as they put it, 'emerged'. A data structure can demonstrate how raw data has been transformed into codes and then to themes, thus avoiding the issue of confusion which Gioia et al (2012) argue

can arise when identifying if data is a code or a theme. Furthermore, constructing a data structure can, as defined by Mishra & Day (2022), allow themes constructed to lead to a better understanding of the phenomena under investigation.

Given that the interview data was transposed into codes in Nvivo and the then subsequently into a 2ndGEN CHAT activity, creating a data structure ensured a transparency which clarified how the CHAT activities and overarching themes could be constructed. The data structure also demonstrated the process used in the data analysis process and showed how this process made use of the elements of the CHAT activity to define codes leading to the construction of themes (Figure 3.4).

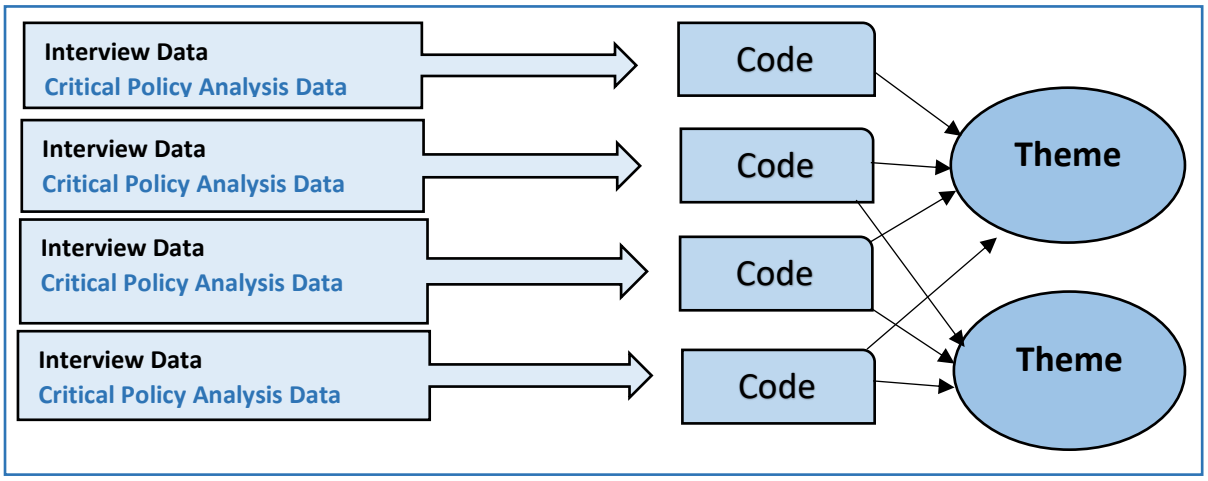

Figure 3.4 Data Structure (Gioia et al 2012)

Interview Data Analysis Process

Being 'captivated by the richness of data' is something that Bryman (2012, p 565) warns against given the large amounts of qualitative data that can be generated, for example in this study through interview transcripts. Bryman (2012) suggests that using a framework for data analysis provides a guide to data analysis and guards against potential meanings being lost in large amounts of data.

The framework for data analysis began during the interview period (Miles & Huberman 1994). Reading and correction of the transcripts generated in Teams was an ongoing process throughout the interview period. This meant that the interviews were still fresh to me. I read through each of the interview transcripts soon after the interview had taken place and corrected where the language had been misinterpreted by the Teams transcribing process. If I was unsure of the transcript text, I was still able to review the recorded interview for clarification.

The interviews transcripts were then converted into Word documents and at this stage pseudonyms were applied to the participants to ensure anonymity. The Word documents were then imported into Nvivo. The corresponding descriptive CHAT element codes created in Nvivo allowed the data to be read, highlighted and dropping into the relevant CHAT element code. Coding Summary Reports were created from the highlighted the data from each participant into one report under each CHAT element code. The reports were then explored to construct the themes associated with the CHAT theoretical approach.

3.7 Ethical Considerations

Does a study contribute to the 'betterment of humanity?' Agostinone-Wilson (2016, p 22) asks. With this in mind, the ethics of the survey and more specifically the interview must be considered and accounted for in terms of how these research techniques impact on the rights of and respect for participants while ensuring that there is a 'balance of power' between the researcher and the participant.

While a survey means that the researcher and participant do not meet, it is important to realise that taking part in a survey encroaches on the participant's life in terms of taking the time to complete the survey and the possibility that questions could be interpreted as intrusive (Cohen et al 2018). Equally, Cohen et al (2018) point out the importance of ensuring that participants are not pressured into taking part in surveys.

Participants can be both passive and active in research, advises BERA (2018). As such, the need to obtain consent should be considered. For the current study consent is required in order to proceed to the survey completion stage, while participants will only be encouraged to take part through a social media Twitter post or via an email invitation.

Given that this was an online survey, BERA (2018) alludes to the fact that while it is anticipated that the data is generated by humans, this may not be the case and computer bots with humans working in the background are a possibility. This is unlikely to be the case for the current study as the consent form must be ticked in order to proceed and automated bots would not be able to tick the box.

The online survey can be further scrutinised in ethical terms when compared to the ethical considerations of an offline alternative such as email (Gelinas 2017). Gelinas (2017) suggests applying the same ethical considerations to social media and evaluating any potential differences. The ethical consideration regarding privacy and anonymity were deemed to be identical to any of the participants contacted by their email address. Similarly, participants recruited via Twitter could only be identified in Qualtrics by their email address.

Like surveys, the interview involves asking questions. Agostinone-Wilson (2016, p. 21) argues that the interview 'is not simply a survey read out loud' and that a clear understanding of ethical issues pertaining to participants in interviews is paramount.

In using a semi-structured interview there are possible factors I must be aware of, such as the potential for any researcher bias, as there may be participants with whose views I agree with and others I do not. Or, I may have the assumption that participants are all equal in their abilities to articulate their perceptions of their CPT role (Cresswell 2014). McGrath et al (2019) caution that the interview should be viewed as a data collection tool, devoid of the informality of a chat. They suggest the use of an interview

guide and a pilot interview to test the clarity of questions, language used and listening technique.

An interview schedule and standardised prompts were used to alert me to the possibility of both researcher bias and being unduly influenced by participants' responses. The pilot interview undertaken also allowed me to analyse the effectiveness of the interview questions in terms of appropriateness and ensure the questions elicited the kind of data required for the study.

Given the power dynamics in society, Agostinone-Wilson (2016) advises that the researcher must be aware of the power of their position. In the current study, as a CPT myself, the power dynamic was reduced given that the participants were in the same promoted position as me. The only issue I could envisage arising would be if I was interviewing participants who were aware they were less experienced and who may potentially see me as more senior to them. My intention was to adopt an interview style that avoided any bias of participants' answers regardless of their age or experience (Bryman 2012). It was made clear to participants that there was no right or wrong answer to questions. To further ensure that participants were put at ease, I also explained that I would avoid making any comments between responses which could be construed as positive or negative. For each question, I listened carefully to the participant's response and restricted my reaction to each question by saying 'thank you for that response' before moving to the next question.

The ethical guidelines widely adopted in conducting research with humans were adhered to in terms of informed consent, the right to withdraw and confidentiality. These ethical aspects were included in the consent forms issued to participants prior to taking part in both the online survey and in interviews for the study in line with the University of Strathclyde's ethical guidelines (University of Strathclyde 2017).

Chapter 4 Critical Policy and CHAT Analysis of the National Improvement Framework policy

4.1 Introduction to Chapter 4

Using Critical Policy Analysis (CPA), this chapter explores Research Question 1 first by analysing how the Scottish Government's flagship NIF policy has evolved over time with particular reference to the policy objective of raising attainment and then attempts to locate how and where the CPT is positioned within the NIF policy.

4.2 Critical Policy Analysis of the National Improvement Framework policy

Understanding how a policy comes into being and what impact that policy is expected to have can be difficult, warns Tatto (2012). But is a necessary part of policy analysis which attempts to make sense of what Priestly (2015) describes in his blog as a vague general terminology used in policy, a vagueness that has been suggested of the NIF policy. This contrasts with previous tools of analysis, such as critical theory described by Taylor (1997), as unable to deal with the complex nature of policy making.

In undertaking Critical Policy Analysis (CPA), Young & Diem (2018) argue that researchers work within a theoretical perspective and that the theory chosen by the researcher will influence how the researcher recognises and describes policy and ultimately the methodology the researcher uses. Furthermore, the chosen theory can also influence the research questions being asked (Young & Diem 2018).

In thinking about how to conduct CPA, in their study of CPA researchers Young & Diem (2018, p. 4) concluded that there are five main areas that CPA researchers tend to focus upon.

1. Concern regarding the difference between policy rhetoric and practiced reality.
2. Concern regarding the policy, its roots, and its development (e.g., how it emerged, what problems it was intended to solve, how it changed and developed over time, and its role in reinforcing the dominant culture).
3. Concern with the distribution of power, resources, and knowledge as well as the creation of policy 'winners' and 'losers'.
4. Concern regarding social stratification and the broader effect a given policy has on relationships of inequality and privilege.
5. Concern regarding the nature of resistance to or engagement in policy by members of non-dominant groups.

Focusing on the critical areas highlighted by Young & Diem (2018) and being mindful of the issues raised by Apple (2018) helped me to shape the critical framework that I have used to research the NIF policy within a CHAT theoretical framework. I was particularly drawn to Young & Diem's (2018) points 1-3 which can both establish the background of the NIF policy and how the policy potentially influences the practices of the CPT in raising academic attainment, while being mindful of the impact of rhetoric and power.

Point 2 led me to begin thinking about a theoretical framework and possible analysis questions which I could see were beginning to form through the lens of critical theory. Forester (1982, p.146) provides a description which contrasts policy analysis and critical theory. He argues policy analysis is concerned with pragmatic policy aspects such as budgetary and organisational analysis, unlike critical theory which takes a more philosophical approach interested in ethics, challenging realism and 'the dangers of tempting pragmatism'. Ultimately, Forester (1982, p. 146) concludes that critical theory can provide a framework which can analyse the outcomes of policy by uncovering systematic 'practical claims-making'.

Interestingly, Young & Diem (2018) tentatively equate the move to a more critical approach to policy research as a response to the neoliberalism of governments globally, leading to the highly prescriptive, top-down form of accountability now prevalent in education institutions, particularly in schools. Although, according to Apple (2019), neoliberalism is not the only factor at play in taking a more critical approach, citing austerity, an audit culture and the definition of a 'good' school or teacher as equally influential. This move to a more critical approach perhaps now allows researchers to redress the balance of top-down accountability by exploring aspects of policies which can point accountability upwards towards the policy makers.

In undertaking policy analysis, Tatto (2012) cautions how factors that the researcher decides are important can influence their policy analysis. Therefore, the researcher must make their framework clear in order to reveal what is and is not relevant to the researcher.

According to Apple (2018, p.227), CPA is essential in exploring structures, power relations and the actions used to change power and structures rather than relying on political 'rhetorical slogans'. Furthermore, Apple (2018, p. 281) argues that in order to critically examine policy effectively, exploring how policy is created and the 'preferred meanings' of the policy makers contained therein is also essential. This is demonstrated by Young & Diem (2018) in their first area of focus for researchers, as detailed above through a concern between rhetoric and reality.

Critical Policy Analysis of the NIF policy

In thinking about the approach I took in analysing the NIF policy, it was clear that my interest lay in challenging the practical claims made by the NIF policy in achieving its objectives. I was then able to understand how the NIF policy had changed overtime and how the power and resource allocation of the policy helped position the CPT within the policy.

Adopting a critical theory perspective as the critical policy research framework allowed me to explore, analyse and question policy text that

perhaps assumes the reader is already familiar with the educational and political jargon being used. Agger (1991, p. 113) argues that contextualising political jargon within a policy text as 'concealments and contextualisations' can alert the researcher to the assumption that the reader understands the policy, but that the policy meaning maybe cleverly hidden to divert the reader's attention. This is something that I could see would sometimes be desirable by governments and policy makers when exploring the NIF policy, and something I wished to be mindful of.

In critically analysing the NIF policy I chose to concentrate on school improvement, which is the fifth of the six drivers for improvement in the NIF policy, as discussed in Chapter 2. This driver highlights one of key roles of the CPT in Scottish education policy which is to drive school improvement through raising attainment. Nonetheless, it is important to see this driver in the context of the other drivers to give a clear overall picture of how this flagship policy itself is situated Scottish education.

After careful consideration of the key concepts of critical policy analysis discussed above, I developed my own framework to interrogate the initial NIF policy of 2016 and the latest 2022 version (Scottish Government 2016 2022) (Figure 4.1). This process provided the context with which to explore how a policy can evolve over time and factors which led to shifts in policy.

1. How did the NIF policy emerge and what problem was the policy intended to solve?
2. How has the NIF policy changed overtime?
3. Who holds the power and resources to implement the NIF policy and is the role CPT or middle leadership evident within this implementation?

Figure 4.1 Questions to interrogate the NIF policy versions 2016 and 2022.

4.3 How did the NIF policy emerge and what problem was the policy intended to solve?

After the Scottish independence vote of 2014 in which independence was rejected, the Scottish National Party continued to govern. In August 2015, the First Minister Nicola Sturgeon delivered a keynote speech in which she set out her agenda for an education system that would solve a long-standing problem in Scottish society of closing the poverty-related attainment. In her speech, Sturgeon invited those to judge her stating 'Let me be clear – I want to be judged on this' (McNab 2015).

This focus by the Scottish Government on closing the attainment gap can be viewed in the global context as an international problem of the relationship between attainment and socio-economic status arising from inequalities in educational outcomes, which have continued to grow in Scotland (Mowat 2017). In the Scottish context, Mowat (2017) argues that the attainment gap continues to grow as children move through the school system from pre-school into secondary school. As such, the Scottish Government has looked both to other countries, bodies such as the OECD and a policy borrowing strategy in an effort to establish a coherent education policy tailored to improving the poverty-related attainment gap in Scotland (Mowat 2017). As such, the NIF policy came into being.

In 2016, the First Minister launched the new flagship education policy, the National Improvement Framework. In the foreword, she stated that the purpose of the policy would be 'key in driving work to continually improve Scottish education and close the attainment gap, delivering both excellence and equity' (Scottish Government 2016). Within this framework, the Scottish Government looked to address one of their political manifesto ambitions and the statement of the First Minister in 2015. They believed she should be judged at closing the attainment gap between the most and least disadvantaged pupils in Scotland (Kintrea 2021, SNP Manifesto 2021) with

their vison for ‘opportunities for all to flourish’ (Scottish Government 2016, p. 2).

The main purpose of the NIF policy was, and still is, the generation of high-quality data and other associated evidence at a national, local and school level, which can then be analysed in order to make informed decisions leading to system improvements with the aim of closing the attainment gap (Mowat 2017). The NIF policy document claims that this focus on gathering high quality data arose from best international practice in data gathering and from advice offered in various OECD publications (Scottish Government 2016).

While one OECD document is clearly stated in the 2016 launch version of the NIF policy document, what is less clear is where the statement on international best practice originates. In his 2015 blog, immediately prior to the launch of the NIF policy, Priestly asked, ‘Should we welcome Scotland’s National Improvement Framework?’. He was highly critical of the ‘unevidenced claims’ made in the NIF policy document. In addition, Priestley (2015) argued that the data required from schools, such as exam and school inspection results, is ‘regulated output’ and at odds with the relaxed approach advocated by the Curriculum for Excellence policy (CfE).

The CfE policy, one of the NIF framework policies, was originally designed to free teachers to develop and teach their own curriculum design rather than the one prescribed to them. However, Mowat (2018) highlights that the opposite appears to be the case when national testing is required to generate performance data. Shapiro et al (2023) criticise that the NIF initiative to raise attainment has in fact been counter-productive to reducing the poverty-related attainment gap.

4.4 How has the NIF changed over time? 2016 and 2022

Critical policy analysis can be used to understand how a policy has evolved over time (Young & Diem 2018). At the time of this research, the NIF policy was in its six version in 2022. An analysis of the 2022 version of the policy and the initial launched version of 2016 would allow for an exploration of how policy priorities can change and adapt to changes in both the external environment and the political objectives of government. Since 2016, the NIF policy had undergone a series of amendments and a shift in policy focus is evident in the 2022 version of the policy.

In comparing the 2016 and 2022 policy texts, the policy launch in 2016 saw the First Minister, Nicola Sturgeon, introducing the policy foreword (Scottish Government 2016). Subsequent versions of the policy have seen the foreword delegated to the Cabinet Secretaries for Schools and Skills (Scottish Government 2022). This would appear to put a measure of distance between the First Minister and the enactment of a new policy. Therefore, anything negative that may arise becomes the responsibility of a Cabinet Secretary rather than immediately resulting in potentially unwanted attention being directed towards the First Minister.

At a recent meeting I attended which looked at 'A Closer look at the NIF policy' presented by Education Scotland, it was made clear by the NIF officers that the foreword was of high importance to readers as it was the foreword that set out the agenda of that version of the policy. The 2022 version of the policy, as with previous versions, was based upon data evidence gathered from the previous year and made available publicly through the NIF Interactive Evidence Report produced annually ("A Closer Look at the National Improvement Framework 2022", 2022). This could be interpreted as an attempt to address the concerns regarding a lack of clear evidence and research supporting the claims made by the Scottish government in defending the NIF policy (Mowat 2018). However, it could be

argued that this Evidence Report, which is a difficult read laced with jargon, may be a vehicle to merely divert the reader's attention, as described by Agger (1991).

Given the importance placed on reading the NIF policy foreword by the NIF officers, I created a word cloud of each of the forewords in 2006 and 2022 to provide an instant visual interpretation of the main themes which may reveal certain priorities regarding policy objectives (Figures 4.2 and 4.3). Word clouds can be a useful research tool providing a straightforward way to represent complex data while avoiding information overload, as well as offering a snapshot of what is and is not contained in text (DePaolo & Wilkinson 2014).

Figure 4.2 Word cloud of 2016 NIF policy foreword.

Figure 4.3 Word cloud of 2022 NIF policy foreword.

In looking at the five most prominent words in each of the word clouds, it is clear to me that there appears to have been a shift in policy focus in the six years since 2016. Unsurprisingly, the pandemic features, but also there is more of a focus in 2022 on childcare, learning and improvement (Table 4.1).

2016	2022
Education	Learning
Framework	Improvement
National	Pandemic
Excellence	Childcare
Scotland	Education

Table 4.1 Five most prominent words in the NIF policy forewords

Of interest here is that given that the NIF policy while squarely focussed on improving attainment between the least advantaged and most advantaged is that words associated with this policy objective such as ‘attainment’ appear in neither policy document forewords while ‘equity’ or ‘equality’ barely feature at all. What may also be notable here is that given the 2016 foreword is attributed to the First Minister, it is more likely for her to take a more general approach using words such as ‘Scotland’, ‘National’ and ‘Education’, as opposed to the Cabinet Minister six years later who may have more of a responsibility for policy based on the annual performance evidence of the policy (Scottish Government 2016, 2022).

In analysing the format of the policy document, a comparison of the ‘key priorities’ of both policies, which remain prominent, was undertaken. Figure 4.4 reveals that there were some notable changes to the 2022 policy. For example, ‘Improvement in attainment of literacy and numeracy’ is still a key priority but is now the last priority rather than the first. This may be due to continued criticism that the attainment gap has not narrowed but has in fact increased (Scottish attainment gap: Nicola Sturgeon accused of being 'all

over the place' 2022) 'vision of the Curriculum for Excellence a policy integral to raising attainment in Scotland (Scotland's Curriculum for Excellence 2021), particularly in the area of assessment.

2016

- Improvement in attainment, particularly in literacy and numeracy
- Closing the attainment gap between the most and least disadvantaged children
- Improvement in children and young people's health and wellbeing; and
- Improvement in employability skills and sustained, positive school leaver destinations.
  for all young people.

2022

- Placing the human rights and needs of every child and young person at the centre of education.
- Improvement in children and young people's health and wellbeing
- Closing the attainment gap between the most and least disadvantaged children and young people
- Improvement in skills and sustained, positive school-leaver destinations for all young people
- Improvement in attainment, particularly in literacy and numeracy

Figure 4.4: A comparison of the key NIF priorities of 2016 and 2022

The key NIF priority of closing the attainment gap has also shifted its position downwards and now uses the more generic term of 'young people' rather than the more specific term 'children'. Young people leaving school who are not in education, employed, or in training in Scotland are known by the acronym NEET and are statistically more likely to come from disadvantaged backgrounds (Raffe 2003). The latest figures show that although NEET school leavers had reduced from 6% in 2020 to 4.2% post-pandemic in 2021, the inclusion of 'young people' may provide policy makers with the opportunity to create a new focus on attempting to reduce NEET school leavers further (School leaver attainment and destinations 2022). Conversely, the term 'young people' may mean those falling into the NEET category are buried within this new term, thus attracting less political attention.

The clearest change to the 2022 policy is the inclusion of the United Nations Convention on the Rights of the Child (UNCRC) as the first key priority in the

2022 NIF policy. The UNCRC was written into Scottish law in 2021, meaning public bodies must act to imbue the rights of the child in all decisions made (Scottish Government 2022). The Scottish Government set out the rationale behind the inclusion of the UNCRC in 2021, stating that 'It is vital to the realisation of children's rights for all those undertaking public functions to consider children's rights in their work' (Children's Rights and the UNCRC in Scotland: An Introduction 2021, P1).

Within the NIF policy document, it is made clear that the inclusion of the UNCRC was a collective decision which received 'universal support' from 'local authorities, teachers, young people and parents' (Scottish Government 2022, p. 6). While this is clearly an admirable and very positive inclusion to the 2022 policy, it remains vague as to how support was sought from these. This vagueness continues to support the view of Priestly (2015) of unevidenced claims, a lack of clarity, and inaccuracies within the policy, a habit the Scottish Government appears to favour.

Within both versions of the NIF policy document, the 'Drivers of improvement in the achievement of outcomes for young people' are listed and described in detail. In the 2022 NIF policy, two new additions were made to the existing drivers: 'School Leadership' in 2016 became 'School and ELC Leadership' in 2022. This pertains to Early Learning and Childcare (ELC) which is explained in the policy document as a means to reflect the 3-18 nature of the national curriculum. The second addition was 'Curriculum and Assessment', previously termed 'Assessment of Children's progress' in 2016. The term 'curriculum' was included with assessment to avoid the curriculum being 'siloed' and to 'give a broader focus which better reflected the intertwining of curriculum and assessment', as explained by one of the NIF officers in their Zoom presentation (A closer look at the National Improvement Framework NIF 2022).

A further change is the definition of the role of the teacher as drivers for improvement. The 2016 version defines teachers in terms of 'teacher professionalism'. Conversely, in the 2022 version this has been subtly changed to 'teacher and practitioner professionalism'. This appears to be in response to the inclusion of Early Years which does not require qualified teachers, but which still requires 'leadership and self-evaluation processes' (Scottish Government 2022, p. 13). Interestingly, the term 'teacher professionalism' also appears in the GTCS Standards for Middle Leadership (GTCS 2021a, p.4).

The changes made to successive versions of the NIF policy since its inception are credited to the evidence gathered from a range of sources including national attainment data and what appears to be other government sponsored sources leading perhaps to potential government bias. Advice on policy progress is sought from bodies such as the International Committee of Education Advisors (ICEA) who convened to advise Scottish ministers (International Council of Education Advisers (ICEA) 2016) and from Scottish Government commissioned OECD reports. These reports are a popular source of data for governments globally and are seen as an attempt to gain credibility and legitimacy (Grek 2019). Conversely, Hallinger & Heck (2011) point out that governments can be guilty of choosing research which tends to support its own agenda.

4.5 Power within the NIF policy

It is clear that the initial holder of power in implementing the NIF policy is the Scottish Government who has, over the last 15 years, dedicated significant funding and resources in an attempt to close the poverty-related attainment gap (Mowat 2018). By continually reviewing the policy annually and formulating a new improvement plan based on gathered evidence from a range of sources, the Scottish Government has maintained a clear commitment to the NIF policy.

The Scottish Government has faced criticism in delaying its publication of research (BBC 2021), which perhaps may not present its education policy in a favourable light. This reveals how the government manage their policy message in favour of their own position.

In terms of resources, the Scottish Government has the power to allocate funding for NIF policy initiatives and makes a range of claims for this within the NIF 2022 document, such as providing funding for extra teachers, an extra £20 million added to the Pupil Equity Fund, and raising the amount of money available to the school clothing grant (Scottish Government 2022). However, Scottish education funding has been criticised for being too reductionist and focussed too narrowly on specific social problems to the exclusion of other problems and other agencies (Enang et al 2022).

The Scottish Government further delegates the power to implement the NIF policy to local authorities through the imperative for Local Authorities. This produces their own Improvement Plan in which the key NIF drivers are clearly stated and actions points describing implementation are visible.

Local councils, with their statutory duty for education provision and in setting out their own local education improvement plan, must take full cognisance of the NIF policy expectations set out by national government. Power to implement the NIF agenda is then delegated to senior leadership within schools to enact policy through their own improvement plans.

It would appear that a mechanism of how power to implement NIF policy is delegated is not a concern of the Scottish Government given it does not appear anywhere within the policy text. Within the NIF policy document, teachers and schools are referred to as a generic group in terms of the general issues in which they are involved, such as the quality of teaching, assessment, or learning and teaching specifically (Scottish Government 2022).

Furthermore, there is no mention made of the requirement for schools to include the NIF policy in their own improvement plans, which could provide

a clearer understanding of how the NIF policy should be enacted. Therefore, it is at this point that attempting to trace how power is delegated within the policy to schools and the CPT reaches a dead end, finishing with local authorities. What must also be recognised here is the long established historical structure of education is Scotland in which power is delegated by the Scottish Government to local councils tasked with enacting government policy. This must be detailed within their local improvement plans and thereafter it is the responsibility of local authorities to delegate power to schools.

In addition to the power of implementation delegated to local councils is the allocated funding that is set out by the Scottish Finance Minister ('Scottish Budget 2022 to 2023' 2022). This includes a Pupil Equity Funding (PEF), which is a specific source of funding to be used specifically to address the NIF policy objectives and is allocated to councils in areas of deprivation (Mowat 2017). However, earmarking funding for a specific policy objective, such as raising attainment in areas of deprivation, can mean that councils pay too much attention to that area of their budget in order to justify how it is being spent, leaving less time and attention for other aspects of education (Enang et al 2022).

In both versions of the NIF policies, no mention is made of any specific group of teachers, such as those in promoted posts with specific responsibilities for school policy, such as Senior or Middle leadership. The reason of this may be the reliance of policy makers on the other education institutions who engage directly with the teaching body, such as the HM Inspector of Education (HMIE) for school improvement and self-evaluation and the General Teaching Council for Scotland (GTCS) responsible for setting the teaching standards for all teachers.

In essence, the NIF policy can be viewed as the delegation of power to implement policy agenda to local authorities through external agents visible within the NIF policy. Schools can perhaps be viewed as internal agents within the local authority education system and so appear to be largely

hidden within the national policy, but highly visible to the policy driven bodies of the HMIE (Education Scotland 2023) and GTCS (GTCS 2021a, GTCS 2021b). These bodies ensure the NIF policy is implemented through ensuing standards of teaching professionalism and the accountability for improvement and self-evaluation, which provides the foundation on which education policy can be implemented and enacted, specifically in terms of this study.

4.6 CHAT Analysis of the NIF policy

Having conducted a critical policy analysis of the NIF policy and its origins, it becomes clear that the NIF policy could be constructed as a CHAT activity, viewed as a 'social resource' capable of influencing and changing social actions (Naussbaumer 2012 p. 46) and as the specific unit of analysis (Blunden 2007). Therefore, the NIF policy could be the subject of analysis as a CHAT activity in developing a clearer understanding of how it draws together a range of individual actions, dynamic relationships, contexts and instruments to facilitate the enactment the policy in schools. More specifically, this can be examined in terms of policy enactment in the curricular department led by the CPT. It is at this point in the research that exploring how and where the CPT is *positioned* in the NIF policy can begin.

Exploring the NIF policy as a CHAT activity identified policy influences and considered the opportunities and constraints of cultural and historical factors (Hancock & Miller 2018) which can be used to discover the how and where the CPT is positioned in the NIF policy. The CHAT analysis process was influenced by the CHAT research framework used by Trust (2016). The NIF policy document was analysed and defined using the elements of a CHAT activity, which then led to the creation of a 2ndGEN CHAT activity diagram (Figure 5.5).

Object and Outcome

The influence of the NIF policy object shapes the actions of the CPT, who at the school level is involved in gathering the internal 'small data' needed to

‘track and monitor’ academic performance (Scottish Government 2022, p. 17). Within in the context of equity for young people, schools must consider the external data made available to them, such as literacy and numeracy data and the SIMD data defining areas of deprivation used by the Scottish Government to allocate PEF to schools on a per capita basis (Scottish Index of Multiple Deprivation 2022). For the CPT, this data must be used to ‘validate and enhance the quality of assessment practices’ within departments (GTCS 2021, p. 8). Given that data is gathered system wide over successive years, the historical nature of the data gathered from previous years can influence the future actions taken by schools and the CPT to achieve the NIF policy object and outcome.

The improvement imperative is at the heart of the NIF policy and a clear object of the NIF policy activity which asks for ‘system wide improvement’ in order to close the attainment gap (Scottish Government 2022, p. 26). Improvement, as discussed in Chapter 2, has become a prominent feature of education policies globally (Hopkins et al 2014), so much so that improvement has now become part of the culture of education and now permeates education systems both globally and in Scotland all the way into the classroom. For the CPT, the culture of improvement is a key feature of their middle leadership role involving aspects such as teaching professionalism, the pupil learning experience, and raising attainment, all of which are deeply embedded within both the school and curricular department improvement plans.

Subject

The subjects engaged in the NIF policy activity are recognised through a hierarchical structure which is evident in the wording of the NIF policy text. The Scottish Government, represented by the Cabinet Secretary, having set out the policy objectives in the foreword of the NIF which is relies on supporting evidence from a variety of sources such as the OECD, Audit Scotland and the ICEA discussed in Chapter 5. Within the NIF key drivers for improvement, the role of local government in eschewing the policy priorities

is clearly stated. Meanwhile teachers are defined generically as a subject, are afforded their own NIF driver, and are defined generically under Teacher and Practitioner Professionalism (Scottish Government 2022), despite having a range of promotional levels, such as middle leaders, and existing in a variety of educational settings. The policy text makes clear the obvious crucial role that teachers play in terms of the 'overall quality of the teaching workforce in Scotland and the impact of their professional learning on children and young people's progress and achievement' (Scottish Government 2022, p. 28). Therefore, it must be assumed that the CPT, similar to other promoted levels, is embedded within the definition of Teacher and Practitioner Professionalism. The term 'teacher professionalism' within the GTCS Standards for Middle Leadership (GTCS 2021a, p.4) can also be seen as creating a link between policy and practice.

Tools

Tools can define how the subject carries out the actions required to achieve the object of the activity, can be both physical and psychological (Trust 2016) and are evident within the drivers for improvement in the NIF policy. The physical tool most evident in the NIF policy is the finance tool which can prove to be both useful and a constraint. Within the NIF 2022 policy, document funding is focused on COVID-19 recovery through an increase in pupil equity funding. However, rather than focussing on the councils which experience the highest rates of deprivation, the funding became more widely spread (Whyte 2022). This may be due to criticism of the once more targeted councils with high rates of deprivation where the attainment gap had continued to grow (Knutt 2022). By widening the eligibility of councils, the Scottish Government may be seeking better prospects for improvement in attainment. While this provides opportunities for other councils to access funding it conversely creates a new financial constraint for those poorer councils losing out on previously ring-fenced funding.

Performance data can also be defined as a tool and required to ‘get a full picture of how well Scottish education is improving’ through a ‘balanced range of measures’ (Scottish Government 2022, p. 49). Gathering performance data is a key role for local authorities and is carried out in schools through monitoring and tracking academic attainment data by curricular departments, for which local authorities are credited in enhancing the capacity of teaching staff to do so effectively (Scottish Government 2022).

The Assessment and Curriculum driver for improvement requires data to be gathered on pupils’ learning and academic achievements. In gathering pupil data, CPTs carry the responsibility for managing the methods and timings of assessments implemented in curricular departments and ensuring data has been gathered and then analysed effectively to continue to attempt to improve attainment. This driver also assumes a culture in which teachers know their pupils well and ‘have a clear understanding of their pupils’ needs’ (Scottish Government 2022, p. 39).

The NIF priority of School and ELC Improvement tasks schools with the overall responsibility for the quality of education in terms of learning, teaching and assessment. The tools used to filter this responsibility to CPTs is achieved through the local authority plan from which the school improvement plan is formulated by senior leadership. The school plan provides the CPT with the tools required to form a series of action points based on the NIF priorities as defined by the senior leadership. These action points form the basis of the curricular departmental improvement plan and are formulated by the CPT. This departmental improvement plan then acts as the tool which gives direction on how raising attainment as a NIF priority should be driven forward by teachers.

Community

The shared interest of the NIF policy is wide to include a range of stakeholders. Most obviously are the national and local government bodies who clearly have an interest in schools taking policy actions forward, in addition to teachers and parents. Within the NIF 2022 policy, the rights of the child are now included. As such, children and young people are to 'be at the centre of everything we do' (Scottish Government 2022, p. 5).

Within schools, any influence of the parent voice can prove to be a challenge in implementing of the rights of the child in a meaningful way, despite being written into parental rights legislation (Scarparolo & MacKinnon 2022). The pupil voice has also been viewed as a way to create a 'culture of surveillance' in keeping with the culture of school accountability (Skerritt et al 2021, p. 2). The Parental Involvement Act 2006 does attempt to ensure that parents and carers have a clear role to play as part of the education community ('Scottish Schools [Parental Involvement] Act 2006' 2022).

Division of Labour

In a clear hierarchical structure, the division of labour in implementing the NIF policy begins with the role of the local authority, one which is clearly stated throughout the NIF policy text as a means of achieving the vision and aim of the NIF policy (Scottish Government 2022). In having differing levels of population and deprivation, local authorities have the knowledge and expertise to tailor NIF priorities within their own local improvement plans ('SIMD (Scottish Index of Multiple Deprivation)' 2022). Similarly, even within same authority, schools are able to tailor their own improvement plans through senior and middle leadership to address the NIF priorities and, as such, allocate their teachers accordingly.

Rules

The rules which local authorities and schools most closely identify with are set out within their improvement plans, as discussed in Chapter 2. The NIF

policy document clearly states the need for local authorities to produce an improvement plan 'which should inform and reflect the NIF priorities and ensure the clear line of sight between local and national expectations' (Scottish Government 2022, p. 12). The stipulation as to what the local plan should include may constrain local authorities' ability to enact their own agendas within their local plans to some extent when there is overriding focus on NIF priorities. Furthermore, these potential constraints may also be experienced in schools tasked with implementing local plan priorities through the school improvement plan, which can in turn influence the CPT in formulating their own departmental improvement plan, and ultimately affect how these rules impact and influence the teachers within their departments.

The NIF driver of Teacher and Practitioner Professionalism provides further rules for how teachers should perform their role. Local authorities are expected to provide opportunities for continuous professional development in areas such as teaching, learning and assessment to order to assist reducing the attainment gap and improve the quality of teaching (Scottish Government 2022). This is in addition to the input from both the GTCS and HMIE in governing teaching standards in Scottish schools.

Parental engagement, defined previously as a community element, is enshrined in Scottish law ('Scottish Schools (Parental Involvement) Act 2006' 2022). This act gives parents the right to a school parent council and the right to contact the school with concerns or complaints. As such, local councils and schools must abide by this legislation and take cognisance of parental views. Through the NIF priority of Parental/Carer Involvement and Engagement, the NIF policy seeks to strengthen this relationship by providing rules for local authorities and schools in how to ensure effective parental engagement.

4.8 The National Improvement Framework policy as a 2nd GEN CHAT Activity System

Exploring the NIF policy as a CHAT activity presented the opportunity to analyse the policy as what Naussbaumer (2012, p. 46) terms a 'social resource' and as elements of a sociocultural network (Trust 2016). Government policies, in terms of CHAT analysis, can be defined as a social resource given that they consist of a range of sociocultural elements acting together with the goal of progressing the wellbeing, opportunities and economy of a society.

The CHAT activity analysis and the diagram created (Figure 5.5) present an understanding of how education policy moves from policy text to the practical actions within an education system, which can be described as a hierarchical framework infused with both cultural and historical elements.

The position of the CPT in the NIF policy, while seemingly absent from the policy text, can be revealed within the driver Teacher and Practitioner Professionalism through the analysis of the NIF policy as a CHAT activity forming a complex social practice (Foot 2014). The CPT is revealed to be embedded through mediating the CHAT elements necessary to achieve the NIF policy object of raising attainment.

CHAT analysis reveals how the NIF policy makers rely heavily on the cultural and historical nature of the Scottish education system. In identifying the teachers as a subject element, teachers are defined as a generic group with no reference to the role of either senior or middle leaders. However, policy makers, from a historical perspective, would need an awareness of the hierarchical structure of schools and the way power is delegated within the school structure from senior and middle leadership through which policy makers would assume policy objectives would be enacted. Policy implementation in schools can then be monitored through the imperative to gather attainment data (Kintrea 2020) crucial to the NIF policy in providing oversight and generating accountability.

Teacher and practitioner professionalism as a driver for improvement highlights further the historical assumption that the quality of teachers is a requirement in order to enact education policy effectively. Policy makers would have an awareness of the historical oversight of the GTCS as the independent professional body tasked with upholding teaching standards in Scotland GTCS 2021a, 2021b) and HMIE in inspecting improvement and self-evaluation in schools (Education Scotland 2020).

The CPT as a subject element was revealed to be embedded in the culture of the Scottish education system. Through policy makers, assessment is an important aspect of learning and teaching (Simpson & Hayward 1998). Given that policy makers have created a culture of assessment and accountability over decades, they possess a cultural and historical understanding of how assessment can be used by them as an indicator of policy effectiveness. Therefore, I would argue that the CPT, within the school hierarchy, engages as a subject in the NIF CHAT activity through mediation with various elements of the CHAT activity to develop practices necessary to enact the NIF policy object of raising attainment.

Data gathering as one of the objects of the CHAT activity further illustrates how the CPT is embedded in education policy. School data is defined by the NIF policy as ‘small data’ used to track and monitor pupil and teacher performance. This reference to ‘small data’ further infers the crucial role that the CPT plays in the data gathering process within departments (Scottish Government 2022, p. 17). The object of data gathering is closely related to the second object element of the NIF policy, which is to understand what drives improvement. The use of the quality data to drive the object of improvement, embedded in the culture of Scottish education, provides the impetus which motivates the practices of the CPT to pursue improvement which manifests as the outcome of raising attainment.

Data is identified and defined as a tool used to raise attainment and is embedded within the NIF policy’s deep reliance on the generation of data (Priestly 2015). Data as a tool is used to mediate the actions of the subjects

within the activity system (Postholm 2015). For the CPT, this can result in shaping new practices, re-shaping existing practices, or the division of labour, each of which are necessary to achieve the object of raising attainment.

Defined as the rule element of the CHAT activity which mediates actions (Posthom 2015), the NIF policy directive that local authorities must produce an improvement plan filters down from local authorities and into schools and then further still to departments who must produce their own departmental improvement plans, as discussed in Chapter 2. This improvement plan provides the CPT with means to create and mediate their own rules both with senior leadership and their departmental teachers in order to pursue the improvement agenda and to raise attainment for the coming academic year.

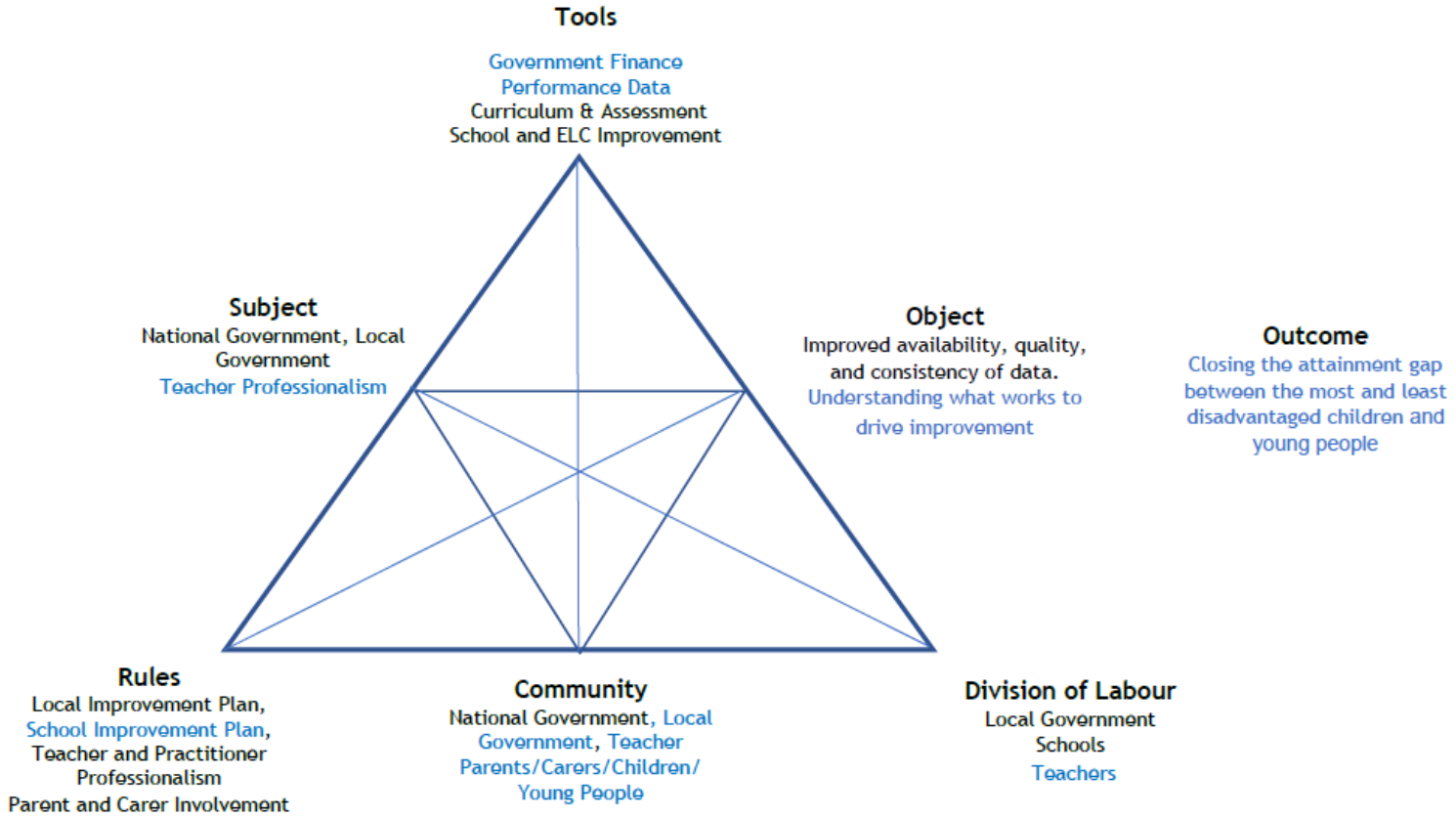

Figure 4.5 NIF Policy 2ndGEN CHAT Activity System

4.9 Discussion of Chapter 4

The NIF Policy (2016-2022)

The main focus of the NIF policy is to close the poverty-related attainment gap by raising school improvement. This goal was and still is expected to be achieved through gathering rich data from a range of sources, including schools, which can then be analysed and acted upon by the government in formulating further versions of the policy, while holding local councils and schools accountable.

In analysing the general nature of the NIF policy, the use of performance data is a key feature in making improvements in order tackle poverty in Scotland (McCluskey 2017). The NIF policy text argues that the value of data gathering is based on international best practice but has garnered criticism for forcing schools to provide prescribed data, such as exam results (Priestly 2015). Data is then analysed by a range of what appears to be government sponsored bodies, such as commissioned OECD reports and a convened committee of education advisors (International Council of Education Advisers (ICEA 2016). As such, there is a potential for political bias if data analysis is not even in part conducted independently from the Scottish Government.

The first version of the NIF policy introduced in 2016 was deemed vague by Priestly (2015) in terms of how the policy aims were to be achieved. Mowat (2018) highlights the inadequacy of the use of data in determining school improvement in addition to the lack of references to research in supporting the policy rationale (Mowat 2018). By 2022, a number of changes to the policy had taken place. The issue of gathering data raised by Priestly (2015) appeared to have been addressed with a clear system of data gathering established though publicly available evidence reports produced annually and the continued use of advisory bodies such as the ICEA to recommend policy changes and refinements (ICEA 2016).

A change in policy focus had taken place in 2022 which appeared focused on more specific internal issues of childcare, improvement and learning rather

than broad generic issues, defined by terms such as ‘Scotland’, ‘framework’ and ‘national’ in 2016. This may be due to an increase in government confidence as to the purpose of the policy in 2022, which appears to have more of an active focus on how to close the attainment in a practical sense.

Responsibility for the NIF policy had also changed by 2022. A cabinet minister, rather than the First Minister, now presents the all-important foreword of the policy. This may signal how the policy has become a mainstream element of Scottish education and is no longer regarded as requiring the high-profile endorsement of the First Minister.

In exploring the NIF policy in 2016 and 2022, it is clear that the policy has changed over time in terms of priorities and in how these priorities are represented within the policy text. In terms of how the CPT might be positioned in education policy, the CPT is a policy actor and subject to policy changes which will impact their practices. However, the CPT as a middle leader is not visible within the policy text like other promoted posts. This implies a potential lack of understanding by policy makers of the importance of the middle leadership role in enacting policy.

The NIF Policy CHAT Activity System

CHAT analysis of the NIF policy allowed the cultural and historical influences which impact the NIF as a CHAT activity system to be identified and explored (Postholm 2015). In identifying the historical influences on the NIF policy it appears that there are assumptions made by policy makers on how education policy will be enacted and by whom. An understanding of the long-standing organisational structure within the education system in Scotland ranging from government to local authorities to schools, as well as an understanding of how these organisations operate, means that only a broad indication of how policy will be mediated and enacted is required.

This understanding is not limited to policy makers. Clearly, all policy actors within the Scottish education system should be aware of their purpose and responsibilities through a historical understanding of how the system

operates, therefore recognising how they, as actors, are situated within the activity system. As part of the Scottish education system, while not explicitly defined in the NIF policy, it can be concluded that the CPTs are clearly embedded through the historical expectation that raising attainment will be undertaken by them as part of the process and within the broad definition of Teacher and Practitioner Professionalism. Within the NIF policy text, there is an understanding by policy makers of the historical elements which mediate the actions of how schools operate to enact policy.

The position of CPTs in Scottish education policy, and of all teachers in general, can be further highlighted through the GTCS Standards which define and govern the professionalism of teachers at all levels from the first teacher to head teachers (The General Teaching Council for Scotland 2022). While teaching professionalism is highlighted in the NIF policy, there is little detail of an expected impact. This may further demonstrate the historical and cultural assumptions of policy makers that the GTCS professional standards are capable of delivering on the NIF objectives.

CHAT analysis of the NIF policy revealed the deeply embedded cultural nature of the assessment driven education system in Scotland which continues to be used to define the success of Scotland's young people in their education (KIntrea 2020). Improvement through raising attainment is at the heart of the NIF policy and is identified in the CHAT activity system as the main object. The CPT can be identified as a subject of the CHAT activity as 'teacher and practitioner professionalism', demonstrating the close relationship to the object element of raising attainment. This relationship represents the crucial role the CPT plays in their practices to ensure teachers' effective teaching and learning of the curriculum leading to pupil attainment and the data generated and used to interrogate pupil performance.

The ability to relate CPT practice clearly to the NIF policy through the use of the CHAT framework demonstrated how the CPT is embedded in the culture of assessment so much so that there is an assumption by policy

makers that raising attainment will be led effectively via the structures embedded in schools.

Additional elements identified within the CHAT activity further demonstrate where the CPT is positioned in education policy. Data can be defined as both a further object of the CHAT activity system through the generation of data but also as a crucial tool used to mediate the practices of the CPT. The CPT can be identified in the NIF policy text definition which relies on the generation of 'small data' (Scottish Government 2022). This leads to the assumption that attainment data is generated and used by the CPT as a tool to track and monitor attainment performance of both pupils and teachers. Gathering this attainment data can be further defined as a practice of the CPT and discussed further during the interview stage of this research.

The requirement to produce improvement plans across the school education system is clear in the policy text from which the role of the CPT can be further identified. The imperative to produce improvement plans can be seen in the historical context of the perpetuity of producing improvement plans as a means of providing oversight and accountability. However, improvement plans also act as the tool for CPTs to create and apply their own rules within the CHAT activity. The CPT must produce a departmental improvement plan, which provides the means to negotiate the direction of the department with staff but also the means to create their own oversight and accountability which filters upwards to senior school onto the local authority and back to the government and the policy makers in the form of performance data.

4.10 Summary of Chapter 4

The NIF Policy

At first glance the NIF policy does not include any reference to middle leadership and the role that it would play in enacting the policy, choosing to define all teachers generically. Therefore it might appear that the CPT is not positioned within the NIF policy. However, CPA and CHAT analysis reveal the

context of the NIF policy in terms of both school improvement and raising attainment and crucially how the CPT is embedded and positioned in Scottish education policy. This is illustrated in the NIF policy text which uses the terminology of 'Teacher and Practitioner Professionalism' (Scottish Government 2022) to define all teachers and thus CPTs as policy subjects both shaped by the policy and as enactors of it (Ball et al 2011c).

Introduced in 2016 and revised annually, the NIF policy is firmly embedded in the landscape of Scottish education. In its 2022 form, the policy appears to have developed a more inward facing focus on the child while still continuing to promote school improvement and closing the attainment gap. This focus may be partly due to the effects of the pandemic referenced in the 2022 foreword.

The 2016 version, which appeared to take a more globalised and almost generic approach, may be due to the tactic of a more tentative launch which would result in less targeted scrutiny of the impact of this new policy at a domestic level. By 2022, more confidence in the potential to achieve policy objectives when compared to the 2016 version of the NIF has perhaps led to a more targeted approach to policy objectives at a local level.

To close the attainment gap, the NIF policy requires data collection from a variety of data sources and specifically from schools in the form of attainment data. This data is then reviewed by government appointed bodies such as the ICEA and the OECD whose advice is used to inform how improvements can be made to further achieve the policy objective of closing the poverty-related attainment gap.

In conclusion, the NIF policy is clearly embedded within the Scottish education system, has continued to survive over the past six years, and shows no sign of being abandoned; rather, it has been continually refined to suit the subtle changes to Scottish Government education policy objectives.

The NIF Policy CHAT Activity System

Through the use of CHAT analysis, I have been able to trace the NIF policy as a Scottish Government policy into the school setting, demonstrating that there is a clear relationship between the NIF policy and the CPT who is positioned within the policy and tasked with enacting the policy objective of raising attainment. This had been achieved through analysing the NIF policy as an element of a CHAT activity system, illustrating the relationship between people, tools, and objectives within a historical and cultural context (Trust 2016).

In moving forward, CHAT analysis of the NIF policy inspired the means with which to further explore the research question, 'How is the CPT was *positioned* in Scottish Education policy?'. By identifying the context of the CPT in the NIF policy CHAT activity system, the CHAT elements were used as the basis of the interview phase of this research, which reveals a theoretical understanding of the practices of the CPT in raising attainment as a further CHAT activity system.

Chapter 5 Survey Findings

5.1 Introduction to Chapter 5

This chapter explores how confident CPTs are in relation to the GTCS Standards for Middle Leadership (GTCS 2021a), and more specifically in their role as managers and leaders. This is important given the GTCS standards make a clear distinction between leadership and management, help to set the context of the CPT in understanding their practices in raising attainment, and demonstrate the position of the CPTs within the 'Teacher and Practitioner Professionalism' from the NIF policy text (Scottish Government 2022).

The survey data explored the position of the CPT in education policy through the lens of the GTCS Standards for Middle Leadership (GTCS 2021a). Later, during the interview phase, two questions were formulated which focused on CPTs understanding of management and leadership as defined by the GTCS (GTCS 2021a), which then provided qualitative data to support the quantitative findings on the subject of management and leadership from the survey.

Survey data was generated using a 10-point scale Likert scale derived from the GTCS Middle Leadership Self-Evaluation Wheel statements (Figure 3.1). In order to explore the management and leadership roles of the CPTs, two codes were used which defined the survey questions further into the categories of 'managerial' or 'leadership' roles. These categories were influenced by the descriptions of middle leadership roles evident in previous literature (De Nobile & Ridden 2014, Basset 2016) and illustrate how both of these roles remain integral to the practices of the middle leader.

From the survey data, a series of pie charts were created to help support discussions. Conclusions drawn from the online survey data provided a means with which to prompt further discussion during the interview phase of how participants viewed their role as both managers and leaders as discussed in

previous middle leadership literature (Gurr & Drysdale 2013, De Nobile 2018, Forde et al 2019).

5.2 Online Survey

The online survey, made available through Twitter and email, drew 60 respondents; however, on closer inspection, once the survey was closed only 34 respondents had fully completed the survey with the remainder appearing to have given consent to take part, but then left the survey unanswered. This may have been due to participants potentially having difficulty in accessing the entire survey via their mobile phone screens. On investigation the survey accessed by mobile phone required participants to scroll down to access the survey once they had consented, unlike on a computer screen where the survey was more obvious. This could caution against choosing social media as the sole source of attracting survey participants as accessing surveys via mobile phones can perhaps prove to be problematic.

While the sample size was reduced, Cohen et al (2018) advises that the minimum sample size for quantitative research is 30. The sample size still allowed for relevant observations to be made and contributed to answering the research question of how the CPT is positioned in Scottish education policy and in formulating semi-structured interview questions.

The Likert Scale

Survey data was generated from questions presented to participants based on statements within the GTCS Self-Evaluation Wheel for the Standards of Middle Leadership (GTCS 2021c). The self-evaluation wheel in the documentation used a 10-point scale to rate responses ranging from '1 = really not confident/unfamiliar with this/lots of areas to develop or work on; to 10 = feel very confident/accomplished in this area' (GTCS 2021c, p. 1).

While there is no consensus on the optimum number of intervals in a Likert scale (Croasmun & Ostrum 2011), a 10-point scale can result in the gathered data according to each scale being too similar. For example, a participant's

scale 3 response can be very similar to a 4 response and so on (Cohen et al 2018). However, Wu & Leung (2017) argue that a 0–10-point scale can allow the data to be treated as a continuous measure from which arithmetic calculations can be made.

1 to 10-point scale	
1	Really not confident
2	Not confident
3	Much less confident
4	Less confident
5	Slightly less confident
6	Slightly confident
7	Fairly confident
8	Somewhat confident
9	Quite confident
10	Very confident

Table 5.1 The GTCS Standards for Middle Leadership 10-point scale

The survey closed 30 June 2022 when schools closed for the summer break. The final results were downloaded from the Qualtrics website as an Excel file and allowed the data to be converted into a series of pie charts which would be easy to interpret (Bryan 2012). The pie charts depicted the percentages for each of the participants' responses based on the Likert scale (Table 5.1). The Likert scale proved to be effective in providing data which could be easily converted into the pie chart format.

5.3 An Exploration of Leadership and Management

The role of the middle leader can be hard to define (Grootenboer et al 2019). Farchi & Tubin (2018) argue that this difficulty can be due to a variety of factors such as school size, education policy, and local and national circumstances.

De Nobile (2021), in his model of middle leadership, describes two distinct types of roles of the middle leader and a range of 6 associated roles which the middle leader performs. He describes a management role which focusses on processes, organising resources and pupil experiences, and a leadership role involving motivating staff, leadership of improvement, and leadership of achieving the strategic vision of the school. Similarly, Basset (2016) distinguishes between leadership and management with specific expectations of the middle leader including interpersonal skills, strategic planning and administrative tasks.

In their interpretation of GTCS Standards for Middle Leadership, Forde et al (2019), describe both managing departments and leading and collaborating with teams. The GTCS Standards for Middle Leadership (2021a) clearly defines leadership in terms of developing a vision for change, evaluating current practice and outcomes, and mobilising and supporting others to achieve change, while management is defined as implementing and maintaining practices and systems.

I noticed that within the GTCS Standards for Middle leadership, there was the opportunity to explore the management and leadership roles also evident within the evaluation statements of the GTCS Self-Evaluation Wheel (GTCS 2021c) and to treat the statements as codes. Exploring both the managerial and leadership aspects of the middle leadership would allow me to investigate if the findings of Bennett et al (2007) were still evident in middle leadership or if there was an increased confidence in both of these roles.

The use of coding allows data to be organised into groupings which can then lead to the discovery of significant factors from which potential conclusions can be drawn (Bell & Waters 2018).

The terms management and leadership as discussed in chapter 2 were used as codes with phrases common to the management or leadership roles of the CPT were identified within the GTCS Self Evaluation Wheel statements (GTCS 2021c). This was achieved by identifying phrases within the evaluation

statements similar to phrases that had been described in previous middle leadership research. In terms of the leadership role, phrases had described 'strategy', 'evaluation' or 'leading' (Bassett 2016, p. 98). Management role phrases had included 'planning and executing' 'materials', 'student achievement' or 'inventory' (De Nobile & Ridden 2014, p.23).

Similar phrases were identified within each of the GTCS evaluation statement survey questions. Each survey question was then coded as either management or leadership role (Table 5.2). One survey question which addressed professionalism was felt to be equally relevant to both management and leadership and was given equal weighting.

Codes	Phrases with the GTCS statements
Management	curriculum, resources, resourcing, learning, pedagogy, assessment, learners, promote professional commitment
Leadership	leading, lead, strategy, strategic, improvement, self-evaluation, policy, research, political

Table 5.2 Management and leadership codes

The codes of management and leadership were applied to the survey questions and the corresponding data percentages from the Likert scale points demonstrating a positive level of confidence (6-10) were represented together in a table format. The survey questions were ranked in order from the greatest percentage to the least to give a visual representation of the level of confidence of participants in their management and leadership roles (Table 5.3).

Standard for Middle Leadership	Managerial Role	Leadership Role	Very Confident to Slightly Confident
Promote, model, and support the professional values and professional commitment.	✓		97%
As a Middle Leader, you facilitate a culture which promotes and sustains high-quality curriculum practices (including pedagogy and assessment).	✓		100%
As a Middle Leader, you ensure resourcing decisions are taken in fair, transparent and equitable ways taking account of identified priorities.	✓		94%
Have knowledge and understanding of Leadership and Management and how to develop and demonstrate strategic vision.		✓	88%
Help promote the learning context and culture of wellbeing for all, through positive purposeful relationships and partnerships to meet the needs of all learners.	✓		85%
Manage resources in a fair, transparent and equitable way.	✓		100%
Have enhanced and critically informed understanding of the curriculum (in developing content, pedagogy, assessment and provision)	✓		97%
As a Middle Leader, you agree, develop and establish processes to validate and enhance the quality of curriculum practices (including pedagogy and assessment).	✓		82%
Understand and develop self-awareness, political insight and interpersonal skills and abilities.		✓	79%

Standard for Middle Leadership	Management Role	Leadership Role	Very Confident to Fairly Confident
Contribute to and sustain a culture of self-evaluation for improvement to evaluate the impact on every learner.		✓	73%
As a Middle Leader, you contribute to the shared strategic vision, ethos and aims of the school.		✓	70%
Critically engage with policy, research and practice to model, lead and promote a collaborative culture of professional learning.		✓	59%
As a Middle Leader, you have an insight and understanding of the dynamics of political power and influence in the relationship between schools and society in general.		✓	50%
As a Middle Leader, you understand the impact and implications of political insight for your leadership and management practices and the work of school and learning.		✓	55%

Table 5.3 Management and leadership Survey Questions

To further analyse the potential differences in the confidence levels of participants in managerial or leadership categories, I created a series of pie charts from the ranked survey questions. Pie charts can provide a useful tool to visually display the distribution of responses and the frequency of a variable (Nelson 2022). The Likert scale points which contained zero data were excluded.

5.4 The Management Role

Through analysis of Table 5.3 and the pie charts, almost all participants were very confident or quite confident in their responses to questions relating to their managerial role. This suggests that CPTs have a high level of confidence in the aspects of their role involving day to day administrative tasks such as managing resources, the curriculum, pedagogy, and assessment. Gurr & Drysdale (2012) concur in identifying these types of administrative tasks and argue that these tasks can be used to measure the success of the middle leader.

CPTS were 100% confident in the allocation of resources which can be defined as financial and physical. They include the allocation of staff to classes and areas and are discussed more in-depth during the interview phase of the research.

The survey results also showed 100% confidence in the middle leadership standards relating to curricular issues. This would suggest that CPTs understand their role in managing pedagogy and assessment within their departments combined with an expert knowledge of the subject areas for which they are responsible. The importance of the CPT in managing the curriculum is crucial to pupil attainment. Li et al (2018 p.13) conclude that the influence of middle leaders in managing the curriculum is 'substantial and pervasive' in influencing the approaches of teachers to pedagogy and also their own professional development. The confidence reflected here may also suggest that the GTCS have accurately defined the standard required of middle leadership in managing the curriculum.

CPTs were confident in managing assessments within their curricular areas. Given that the NIF policy relies on gathering data (Priestly 2015), raising attainment is based on academic performance data tracked and monitored by the CPT which facilitates self-evaluation in order to achieve improvement in raising attainment. This would suggest that CPTs should be effective in using data as intended by the NIF policy. The use of data by CPTs is a further aspect of the CPT role explored at the interview stage.

5.5 The Leadership Role

Survey questions which identified the leadership role, unlike the management role, illustrated a reduced level of confidence particularly in questions which referred to political insight, engaging critically with policy, and having an understanding of the dynamics of political power. These survey questions resulted in a fractured response from participants across the Likert scale from very confident to not confident (Figure 5.1).

These results suggest that CPTs have a mixed grasp of the issues related to education policy and potentially lack confidence in understanding the impact and implications of political insight or the dynamics of political power. A lack of understanding the role of external political insight perhaps creates a vacuum between policy makers and the CPT as the policy actor and potentially impacts whether education policy is enacted in schools as intended by policy makers.

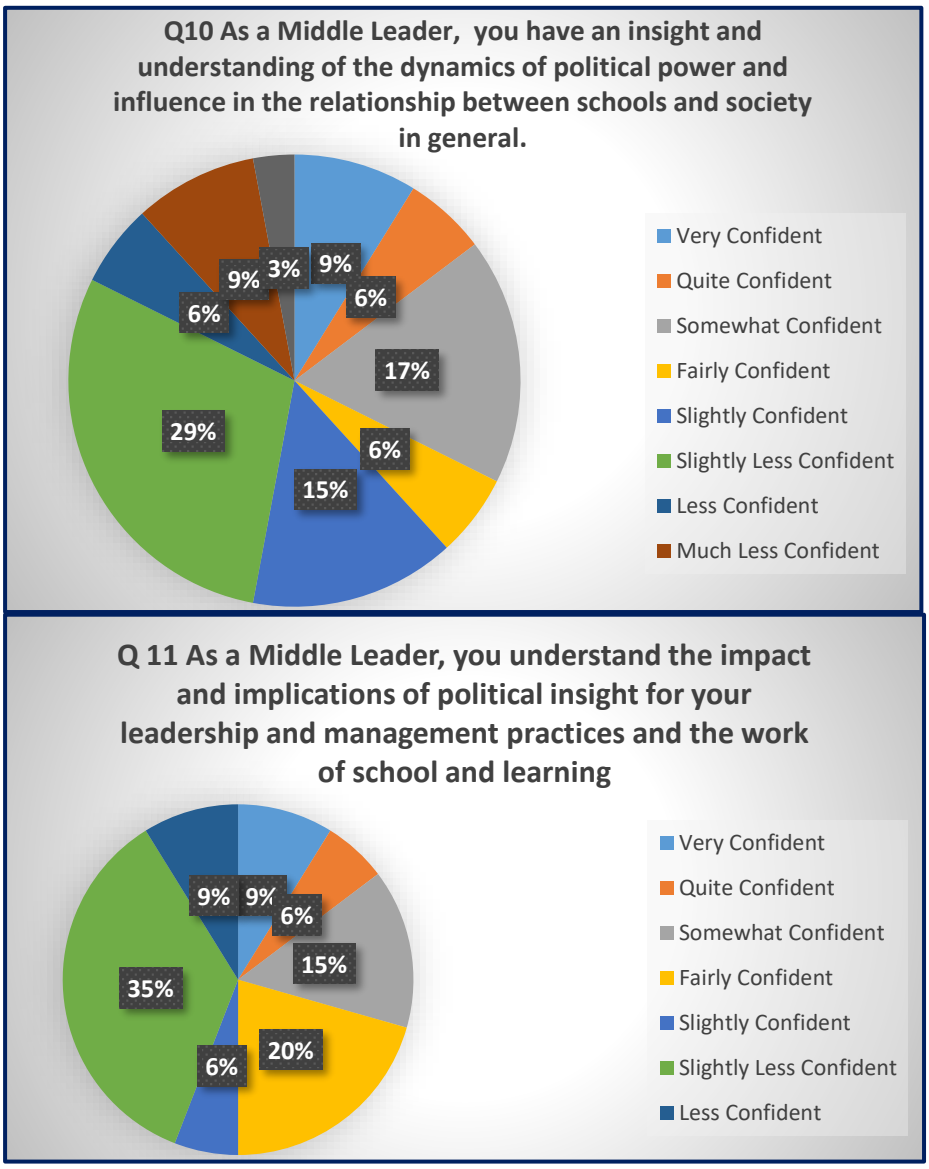

Figure 5.1 Political insight

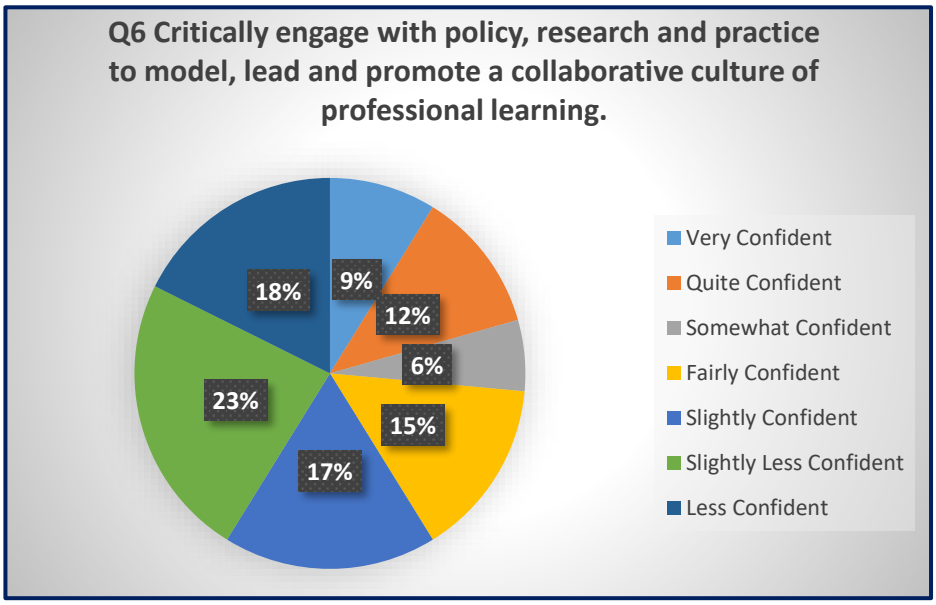

Figure 5.2 **Professional Learning**

Also evident from the survey results was a lack of confidence in engaging with policy, research and practice to promote the professional learning of teachers (Figure 5.2). Given the necessity for Scottish teachers to submit a Professional Update every five years and their commitment to career long professional development and to professional enquiry (GTCS 2021b), it might be expected that middle leadership confidence would be greater due to the responsibility to nurture staff in these areas.

Given the importance of raising attainment in achieving school improvement in Scottish education policy (McCluskey 2017), 70% of CPTs were confident or very confident in their role in contributing to a culture of self-evaluation for improvement. This is despite the seeming lack of confidence CPTs appear to have in terms of political insight, given the global nature of self-improvement in education policy (Reezigt & Creemers 2005). This is an area which is explored further in the interview stage of this study (Figure 5.5).

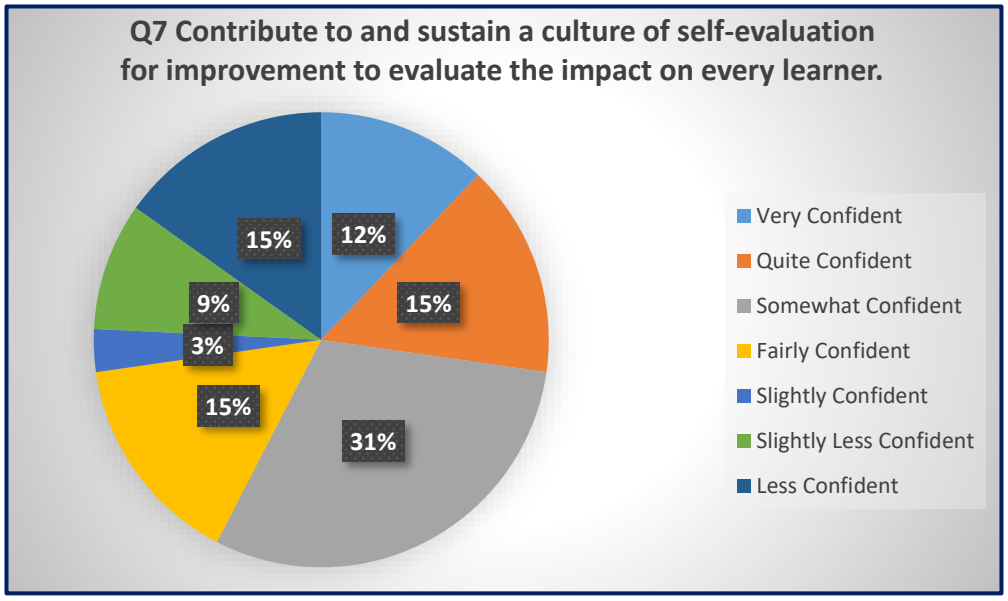

Figure 5.3 School improvement and self-evaluation.

CPTs were also very confident or confident in the interpersonal skills required to lead others and in understanding their role in developing the strategic vision aims and ethos of the school, in addition to the culture of self-evaluation described in the GTCS standards.

5.6 Discussion of Chapter 5

From the online survey was I was able to present a clear distinction between the managerial and leadership function of the CPT role, despite there being no such clear distinction made in GTCS Standards for Middle Leadership. However, as discussed previously, it is clear that there are indeed distinct and discrete leadership and management roles within the school middle leadership role (Bryant 2018, De Nobile 2018, Harris et al 2019).

The Management Role

The managerial role identified in the survey can be seen as a practical administrative role and as the role defined by the GTCS (2021a) as maintaining operational practices and systems. It appears to have changed little since Bennett et al (2007) but nonetheless remains crucial. The CPT, in the management role, is bound by the historically established organisational rules which govern the school day through timetabling classes and assessments throughout the academic year, resulting in a system which has a high level of rigidity and familiarity. The curriculum, for example, must be taught within a certain time frame, with particular resources, and by allocated teachers. Within these curriculum boundaries, the role of the CPT, as the administrator, is to ensure that all deadlines are met and that the daily issues which may arise and conspire to put these deadlines in jeopardy are met. As such, the problem-solving nature of the managerial role requires practical and immediate decision making by the CPT and is crucial, as Bassett (2016) describes, in achieving school objectives. Given the nature of this daily managerial role, CPTs develop as experts in areas such as the curriculum and teaching and learning (Leithwood 2016). The administrative capacity continues to be enhanced through the years of experience they accumulate through their time in the post and may assist in achieving school improvement (Leithwood 2016). This expertise may explain the confidence expressed by most CPTs in their survey responses.

The management role of the CPT continues to be crucial in supporting school objectives (Bush 2008). The survey findings revealed that most CPTs were very confident or confident in managing the day-to-day aspects of their position, such as managing their curricular areas described by the GTCS standards or practices including the oversight of the teaching and learning through promoting teacher pedagogy, allocating resources effectively, or managing assessments and analysing data.

A further possibility that brings confidence to the managerial role is that of the role as classroom teacher and the emergence of distributed leadership which provides the classroom teacher with opportunities to develop their own leadership practices (Hall 2013). In addition, the aspiring CPT has the experience of managing the curriculum as a classroom teacher in areas such as practicing pedagogy, managing classroom resources, analysing performance data and meeting deadlines. These experiences become transferable when the classroom teacher is promoted to the CPT position and so even a CPT new to the role will have some measure of understanding curricular management that can manifest as confidence when undertaking the managerial role of the CPT.

The Leadership Role

In defining leadership, the GTCS (2021a) highlights the responsibility for leading change, sharing values and evaluating practice contrast. However the survey results revealed that CPTs were more confident in certain leadership areas and less confident in others. Bassett (2016) argues that middle leaders are not well prepared for the leadership aspect of the middle leadership role, particularly in terms of dealing with the tensions that can arise between developing positive working relationships with staff and the requirement for the oversight of teacher performance. Moreover, Bassett (2016) argues that just because a teacher is promoted to a middle leadership post and is expected to have the necessary skills to carry out the role, this may not always be the case. However, the survey results dispute a lack of preparedness in the relationship between the CPTs and their teachers as the

majority of respondents were very confident or confident in their leadership self-awareness and the interpersonal skills crucial in leading others.

Other areas in which most CPTs felt very confident or confident was in achieving school objectives, such as school improvement, strategic vision and school ethos. This is important given that senior school leaders rely heavily on middle leaders to take forward the school objectives throughout the school academic year, and because teachers reliant on their CPTS can ensure there is clarity in achieving the school objectives within their classrooms. This illustrates the importance of developing important upwards and downwards connections and the position of the middle leader between senior leadership and the classroom teacher (Forde et al 2018, De Nobile 2018).

The political nature of education is such that it might be expected that CPTs would possess a level of high level of confidence in how their role is situated within education policy and how that education policy influences their practices. The survey results suggested that in terms of political insight in relation to the impact of CPT practices on the school, only 50% of the CPTs were confident or very confident; notably, only 15% were very confident. Similarly, only half of the respondents were confident or very confident in understanding the external political power and the influence of the school in relation to the wider community; again only 15% were very confident. In terms of community, Leithwood (2016) argues that for middle leaders, any community expectations come with significant challenges.

Power remains at the top of the school hierarchy, argue Hammersley & Fletcher (2011). Delegation of power is restricted and only appears to be distributed under the guise of the completion of administrative tasks. However, the GTCS Standards revised in 2021 does appear to demonstrate a clear expectation that political power and insight are essential to the middle leadership role rather than merely carrying out management tasks. It therefore appears that this new standard defining the importance of political insight and power for middle leadership is not familiar to CPTs.

CPTs appeared more confident in the internal nature of the more nuanced political insight associated with interpersonal relationships within their departments, described by Leithwood (2016, p 127) as 'personal leadership resources'. Therefore, it appears that the confidence of CPTs in political insight is stronger in terms of the negotiations and mediations required in the internal top-down/bottom-up relationships (Forde et al 2018) within schools and weaker in a political insight of external environment.

Professional learning, Livingston & Hutchison (2016) argue, is important in meeting the needs of teachers in areas such as managing assessments effectively. However, the confidence of CPTs in leading professional learning as well as engaging with policy and research varies. Only 21% of CPTs are very confident in this area and 40% are moderately or not confident in the survey results. Bassett (2016) argues that middle leaders can be overwhelmed with a multitude of tasks, meaning that the role may not be performed effectively. As such, the issue of time management could be considered as a factor in areas such as professional learning or engaging with research and policy which may not be high on the list of priorities for CPTs.

5.7 Chapter 5 Conclusion

The use of the GTCS Standards for Middle Leadership Self Evaluation tool as the basis for the online survey questions was successful in discovering that CPTs do recognise their own practices within the definitions of the GTCS Standards for Middle Leadership and how confident CPTs are in applying the standards to their own practices. While the management and leadership roles were not clearly defined within the GTCS Standards for Middle Leadership, it was possible to draw a distinction between these roles aided by definitions such as those suggested by De Nobile (2021) and Bassett (2016).

CPTs appeared to be confident in the day-to-day operational management role and confidence levels were high in areas related to their management role. The nature of the management function is highly prescriptive and requires the CPTs to meet a variety of expectations associated with areas

such as the curriculum, oversight of pedagogy, teacher performance and assessment, in addition to the associated administrative tasks.

The management role relies on consistent organisational skills and not the interpersonal leadership skills required to negotiate or mediate with individuals. Essentially, the culture of assessment in Scottish education means that the curriculum operates despite the CPT who, in their management role, needs only to act as a facilitator and administrator. This follows the rigid rules required to ensure that pupils progressing through courses are assessed and that any remedial actions are undertaken and completed before external exams take place. The historical nature and deep-seated culture of assessment through external exams means that an experienced of classroom teacher progressing to the CPT post can bring a certain level of expertise and knowledge, which may explain the higher level of confidence in management tasks.

However, the foundational study by Bennett (2003) focused on the changing role of the middle leader from that of an administrator to a new leadership role in secondary schools. Given that there has been at least a 20-year focus on the importance of middle leadership in schools, one could perhaps assume that the leadership role of the CPTs explored within this research would reflect a clearer understanding by CPTs of aspects of their leadership role now firmly embedded within schools and evident within the GTCs Standards for Middle Leadership with a higher level of confidence.

In terms of leadership, confidence levels were high in most aspects of the leadership role, which required CPTs to engage internally such as through interpersonal relationships, promoting the school ethos, contributing to school improvement and contributing to the strategic vision of the school. Given that Bennet's (2003) study described a reluctance to be involved in leadership, there is now a clear expectation for CPTs to take responsibility for a wide range of leadership tasks.

Survey results showed that CPTs were less confident in the external influence of their political insight and power. Clearly, CPTs possess power within their role which is recognised and defined by the GTCS standards. It can be concluded that CPTs do not seem to understand that their role includes the expectation of engaging with political power and insight within the external community. CPTs also appeared to display a lack of confidence in leading the professional learning of their teachers despite the importance of this (Livingston & Hutchison (2016).

While the GTCS Standards for Middle Leadership effectively reflects many middle leadership practices which were recognised and understood by CPTs (GTCS 2021a), the need for political awareness, as defined by the GTCS, perhaps addresses a concern of Hammersley & Fletcher (2011) that middle leaders hold little power other than what is delegated. This attempt to generate a new focus on political awareness does not appear to resonate with middle leaders in Scottish secondary schools at the moment. I would conclude that this may be due to the relatively recent inclusion of political insight as part of the refreshed 2021 version of the GTCS Standards of Middle Leadership.

A comparison between the refreshed standards of 2021 and the previous 2012 version revealed that the 2012 version of the GTCS standards for middle leadership included a broad reference to understanding education policy (GTCS 2012), which was replaced in the 2021 version with a more detailed definition describing 'understanding the impact and implications of political insight' (GTCS 2021a, p. 8). However, the changes made in Middle Leadership standards in 2021 do not appear to have been effectively communicated to middle leaders in schools given the lack of confidence in political insight. This lack of engagement with the middle leadership standards may be due to the absence of a necessity for middle leaders to engage with the standards in any formal capacity, which may explain the lack of confidence in some aspects of the middle leadership role as described by Bassett (2016).

As discussed in Chapter 4, the embedded nature of the CPT role in the NIF policy points to 'teacher and practitioner professionalism' in order to achieve the policy objective of raising attainment. The Standards of Middle Leadership can therefore be viewed as a facet of Scottish education policy which allows the CPT to be seen within the definition of 'teacher and practitioner professionalism' (Scottish Government 2021). The survey results revealed a lack of confidence in some areas of the Standards for Middle Leadership expected of CPTs in their role as middle leaders, which may impact negatively on the expectation of teacher and practitioner professionalism required for the NIF policy objectives to be met.

5.8 Chapter 5 Summary

The CPT survey has contributed to answering Research Question 1, 'How is the CPT *positioned* in Education Policy?'. The survey revealed the confidence levels of CPTs in the standards for middle leadership as dictated by the GTCS (GTCS 2021a). In addition, the standards for middle leadership were further defined as either managerial or leadership, which furthered the discussion of previous research into these two roles (Gurr & Drysdale 2013, De Nobile 2018, Forde et al 2019).

The middle leadership role of CPT, while clearly defined within the GTCS Standards for Middle Leadership, is also positioned within the NIF policy definition of 'teacher and practitioner professionalism'. The GTCS standards provides policy makers with knowledge of the expectations of the teaching body, which includes CPTS, allowing them to define the 'teacher and practitioner professionalism' required to enact policy. It appears that confidence in 'teacher and practitioner professionalism' may be somewhat overstated by policy makers given that middle leaders appear to lack confidence in some areas of the GTCS professional standards.

Chapter 6 Interview and CHAT Analysis of CPT Practices

6.1 Chapter 6 Introduction

This chapter presents the analysis of the CPT interviews. The first two questions from the interviews explored the GTCS definitions of leadership and management (Appendix 4). The remaining interview questions, based on the elements of a CHAT activity, were then explored incorporating illustrative quotes from the participants which provide useful insights into the thought processes behind the practices of the CPTs. A 2ndGEN CHAT activity system was then created as a theoretical interpretation of the practices of CPT in raising attainment.

The first two questions provided further qualitative data, which supported the results from the survey in exploring the confidence of CPTs in recognising the GTCS standards of leadership and management within their own practice. From interview questions 1 and 2, practices were identified based on the definitions of Leithwood (2016) and De Nobile (2021) (Table 7.1) Subheadings were used to distinguish between Leadership and Management, allowing practices to be defined and explored. As defined in Chapter 2 while administration has been well documented as a role in itself (Gray 1972, De Nobile & Ridden 2014), it is not explicitly defined in the GTCS Standards for Middle leadership and included as a function of the management role.

Leadership practices	Creating a Vison	Distributed Leadership	Self-Evaluation
Management practices	Administrative	Measuring Performance	Time Management

Table 6.1 Common leadership and management practices in interview Q1 and Q2

Activity systems are a method of providing a simple interpretation of participant behaviours (Yamagata-Lynch 2010). In order to gain a clear understanding of the data presented, Yamagata-Lynch (2010, p. 5) argues that there must also be an understanding of 'the participants' cognitive processes'. The subsequent interview questions therefore provided responses which gave an insight into the thought processes of the participants and therefore a deeper understanding of how CPT practices were formulated and enacted by CPTs.

Through using the software package Nvivo, the data were analysed deductively by defining the components of a CHAT activity as codes which allowed me to contextualise the interview transcripts using each of the codes (Basit 2003). The components of a CHAT activity system were embedded within the interview questions (Appendix 4).

Systematic interview data analysis using Nvivo provided the opportunity to explore both of the research questions through the lens of the CHAT theoretical framework. This led to the development of a 2ndGEN CHAT activity which illustrated the practices of the CPT's in raising attainment while exploring deeper the position of the CPT in education policy.

6.2 The Leadership Role

During the interview process, Question 1 asked participants if, having had the GTCS definition of leadership read to them, they recognised this definition in their own practice. All the participants responded positively, stating that they recognised the GTCS definition of leadership in their own practice in terms of how they led their own departments. This would then suggest that the GTCS definition of leadership accurately reflects the middle leadership role in schools.

Creating a vision

Within the responses to Question 1, leadership practices which were common across all participants' responses regardless of their curricular area were identified. The first of these was the importance of the strategic task of creating a vision for the department and that this vision took a shared approach within departments. There was also a clear understanding from most participants of the need to ensure that staff were committed to the vision and aims of the department and that this would be achieved though motivating and inspiring staff, such as providing leadership opportunities and including staff in departmental decision-making.

Caroline explained her role as:

> *"I wanted the vision for the team to be from the team and not me telling them what it is".*

The theme of vision is stated in the GTCS Standards for Middle Leadership as a 'shared strategic vision' (GTCS 2021, p. 7) and so Caroline demonstrates an alignment with the GTCS standards which recognises the importance of vision to the role of the middle leader. The interview data also supports the 'very confident' result of the survey question related to the GTCS standard of 'how to develop and demonstrate strategic vision'. While Bush & Glover (2014) argue that there is mixed evidence of the effect of having a clear vision in terms of school development, it is has become embedded in the practice of the participants as middle leaders and is clear a priority.

Distributed Leadership

A further common practice which emerged from participants' responses was the need for a shared vision with departments, which could be achieved through distributing leadership among teachers. This shared vision was evident from CPTs efforts to ensure opportunities to distribute leadership, which is seen by both CPTs and teachers as a right rather than, as MacBeath (2003, p. 4) puts it, 'bestowed as a gift'. As such, this culture of shared leadership means teachers in departments are prepared to take on further

departmental responsibilities which can be undertaken as professional development opportunities; as De Nobile (2021) points out, distributed leadership does not necessarily correlate to leadership tasks.

Participants appeared to rely on distributed leadership to both motivate staff and share the departmental workload. Distributed tasks could involve leading a subject area, or responsibility for a departmental policy such as recognising achievement awards or homework. Distributed leadership was framed by participants as empowering staff, increasing collegiate working and only possible because of the shared vision which staff were willing to support. Negotiating distributed leadership roles with teachers relies on the skilful use of interpersonal skills. These interpersonal skills, indicated in the GTCS Standards, gained a 'very confident rating' from survey participants. This would indicate that CPTs are confident in distributing leadership opportunities which appear to be embedded within schools and a strategy middle leaders appear to be confident in implementing.

James illustrates this point, describing his passion and confidence in distributing leadership within his department and its impact:

> *"I'm quite passionate about distributing leadership and that's what is empowering staff…it increases collegiate working, but it's more enjoyable, less pressure because you are working with somebody and it's a positive ethos".*

Self-Evaluation

Self-evaluation is the means by which schools are expected to identify areas in which improvements can be made (Holly & Hopkins 1988). For participants, self-evaluation was recognised as a prominent aspect of their role practiced through data analysis and other processes such as lesson observations. Self-evaluation was also seen by participants as a means of sharing good practice within departments. This supported the 'highly confident' survey response to the GTCS standard of contributing and sustaining a 'culture of self-evaluation' (GTCS 2021).

The use of self-evaluation data also allowed CPTs to re-evaluate the vision of the department and adjust this if necessary. The use of data in this way highlights the historical nature of data and its importance in the practices of CPTs.

Debbie M describes how self-evaluation can potentially lead to change within the department:

> *"I think the self-evaluation process certainly always encourages us to utilise the evidence to kind of gauge your vision and what you want to change within the department".*

From the interview data, most participants' saw their leadership role as one which included creating a vision for their departments, carried out self-evaluation, and managed change. Much of this was based on the data gathered within the department.

6.3 The Management Role

The interview responses to the managerial role were again analysed with reference to the GTCS definition of management. Participants' interview responses suggested a high degree of confidence in understanding the requirement of their management role in carrying out tasks such as managing the curriculum, learning and teaching, as well as a range of administrative tasks.

Administration

Lauren illustrates the operational nature of managing a department:

> *"The majority of my day is taken up with the kind of managerial side of things".*

While Jenny describes the role of managing learning and teaching:

> *"So, I'm looking at their results. I'm looking at the output of the department and so I'm regularly seeing that. If a teacher*

is off, I will go in and I'll speak to the pupils and ask how are you getting on? How are you finding the subject?"

Jenny further describes the contrast between leading and managing.

"I think the real challenge is that good leadership takes much more time than good management".

Jenny notes that the management role is dictated by bureaucratic organisational processes, such as administrative tasks, which essentially need to be completed within prescribed timescales. This is in contrast to leadership, which is essentially a much softer skill requiring thought, the ability to build relationships and strategic whole school perspective (Leithwood 2016).

Interestingly, I noticed that the daily time-consuming tasks described by participants do not appear to be recognised or described in the GTCS Standards. The GTCS Standards' definition of management skills appears to be more strategic in nature rather than defining the operational, administrative skills required by middle leaders to be able to deal effectively with the various decisions and negotiations with school community members that are taken on a daily basis (Gurr 2018).

Interview question 2 referred to participants' recognition of their own practice in the GTCS definition of management in middle leadership (GTCS 2021). All participants replied confidently that they recognised the GTCS definition in their own managerial practices. All participants appeared to be clear on the difference between leading and managing a department and were able to clearly delineate between tasks which they considered as managerial rather than leadership in nature. Participants also clearly described the difference between the strategic nature of leading and the operational nature of managing. The ever-present administrative and, at times, bureaucratic aspect of the management role was also evident in the responses.

Andrew describes his strategy for dealing with the managerial side of the CPT role:

> *"I do feel like the best way to deal with the bureaucracy of middle management is just to prioritise it and just do it".*

Debbie H also describes her administrative role in more detail:

> *"You have to be proactive as well as reactive, which makes it more operational. The maintenance of practices and systems".*

Lauren also describes being *"a bit of an admin manager"* which is interesting given that this was the view taken by Bennet in 2003 of the middle leader and again by later researchers such Gurr & Drysdale (2012), Leithwood (2016) and De Noble (2017). The administrative role of the CPT therefore appears to be as relevant as ever and a role that the CPT continues to perform rather than one that has diminished or replaced entirely with a purely leadership role. Thus, the role of middle leader continues to be a complex one (Bassett 2016).

Measuring Pupil Performance

Participant responses highlighted the requirement to track and monitor pupil performance through a centralised recording of internally produced test data used not only to measure pupil attainment, but also as a tool to measure teacher performance and therefore hold teachers accountable for their classroom practice.

Kim describes how tracking and monitoring data impacts her teaching staff:

> "*So, you are doing your tracking and monitoring throughout the year, so making sure that teachers can take ownership of the data as well as ownership of their own classrooms, so they need to be looking at the data".*

In taking ownership of their own class data, teachers are required to reflect and attempt to improve their own performance in order to improve the attainment of their pupils. Biesta (2015, p. 33) describes improved teacher

performance as a consequence of a ‘causal model of professional action’, an action made possible as a result of the data gathering culture in Scottish education.

Ensuring that teachers undertake professional learning becomes the responsibility of the CPT in devising a range of appropriate interventions to support both teachers and pupils to improve pupil performance.

Angela describes her departmental approach:

> *“Like all teaching teams, analysing the results we've picked out a big group that we need to do some interventions with. So, it's getting all the teachers to buy in into it in their classes and then I'm taking the lead with targeted supported study”.*

Interestingly, participants appeared to be more focussed on the internal performance data rather than the SQA exam performance data available. Most participants only briefly discussed the use of SQA results data despite this being the definitive measure of raising the attainment through external exam results on which schools are ultimately judged. This could be due to the need to track internal pupil performance to ensure pupil readiness for external exams; at that point, CPTs have no control.

Additionally, a focus of CPTs and their departments on their own internally generated performance data allows departments to take corrective actions. Meanwhile, external historical attainment data is perhaps only useful at the beginning of an academic year in terms of reflecting on previous practice. However, it maybe that this data quickly becomes a redundant source, given the finality of external exams when nothing further can be done for these pupils who move to new courses or have left school. Biesta (2015, p. 36) makes the point that ‘the means and ends of education are internally related rather than externally related’. Essentially, the internal practices of teachers provide the ‘means’ to develop strategies to improve pupil outcomes with the ‘ends’ being performance in external exams.

Time Management

A theme prominent in responses was the meeting deadlines set by the Senior Leadership Team (SLT) which were described by participants as operational and managerial as opposed to the strategic goals evident in their leadership role. Participants described an array of operational tasks that were seen as being managerial, such as ensuring the availability of teaching resources, sending and answering emails, ensuring assessments were taking place on time or dealing with disciplinary issues.

Within this array of tasks, almost all participants described how time management was an issue when a number of tasks were required to be completed within specific deadlines. Lauren and Debbie both described the managerial role at times as "firefighting" a constant stream of issues which would require action on a daily basis.

Rob describes the impact of the managerial role in terms of time management:

> "*I do probably manage a lot which takes up a lot of my time because much as my staff are fantastic, they're not always the best at meeting deadlines or because they're so busy and they're doing so much".*

Jenny provides a further insight into the various tasks that can lead to issues in managing time:

> "*And the managerial side, that you've got all these resources. How do you make sure they are available? How do you make sure they're up to date? How do you make sure that teachers and wall displays and online material is all functioning and available?"*

The managerial role performed by CPTs can be seen in contrast to the leadership role as one that is operational and requires the CPT to be adaptable and make short-term decisions on a daily basis, which can be time consuming. This is similar to Bassett (2016, p. 101) who also found middle

leaders' time taken up with what he described as 'compliance tasks'. Also made clear here is the prevalence of the administrative role within the practices of the CPT which appears to be an inevitable given the nature of schools as bureaucratic public sector organisations.

6.4 CHAT Analysis of CPT Practices used to raise attainment.

The analysis of the remaining interview question data again adopted the same CHAT framework of Foot (2014) and the CHAT analysis of the NIF policy. I took this decision as I felt this would give continuity to the research approach and ensure reliability in using a singular method. Implementing the CHAT framework previously gave me a certain confidence in my ability to examine the interview data effectively and present the practices of the CPT in raising attainment as a 2ndGEN CHAT activity.

From the design of the interview questions and subsequent coding in Nvivo, Coded Summary Reports for each CHAT component was produced. This approach allowed me to understand the practices of the CPT as CHAT components used in raising attainment. In addition, I understood how the physical and cognitive actions of the CPT were mediated by cultural and historical factors and was aware of the tools available within the school environment (Naussbaumer 2012). I now go on to discuss the interview data in relation to each of the six elements of a CHAT activity system, namely: object, outcome, subject, tools, division of labour and community. Perhaps due to the nature of the interview questions, which focussed on individual practice, the responses from participants did not appear to be influenced directly by length of service.

Object

The importance of raising attainment, specifically through improved SQA examination results, was explored as the desired object component of a potential CHAT activity (Trust 2017). All participants expressed that raising attainment was one of the most important aspects of their role, and perhaps even the most important. Participants were very clear on how raising

attainment influenced their practices, whether in a leadership or management capacity.

Kim described raising attainment as:

> *"One of the biggest priorities and I think it's one of the biggest things we do".*

Lauren highlighted how improvement and raising attainment are closely related:

> *"Again, raising attainment is one of the biggest parts of our job, even when you are doing well, it's always a bit what's next, what can you do better".*

Andrew commented on how CPT can be confident in their role in raising attainment:

> *"I think it's a really, really big focus and I've been really lucky over the years while the attainment in my subject has been excellent".*

These comments illustrate the high priority of raising attainment in schools. They also reveal how CPTs experience this as a source of pressure in continually looking for improvement. However, they illustrate that there was some confidence from the participants in their ability to help pupils improve and raise attainment.

Outcome

Improving the results in external SQA exams as the outcome component of a CHAT activity was explored by asking participants how attainment was measured and how improvement was identified.

All participants expressed their reliance on the tracking and monitoring of internal pupil data and results over the current academic year to monitor attainment and improvement. This was in addition to the analysis of the external SQA exam results at the beginning of the academic session when

SQA results were made available to schools. Use of this historical data allowed for comparisons against previous performance in previous years in terms of the number and quality of the passes. CPTs took this data into account in deciding next steps in terms of strategies to be used in the pursuit of raising attainment further.

Kim highlighted the historical nature of tracking data:

> *"You've really got to just compare that data, so you're looking at how many A's have you got B's etc, based on previous years. Is that similar? Is that the same? Has it got worse or better?"*

In an effort to secure pupil attainment, participants expressed how pupil performance would be analysed individually and not just as a cohort of reductionist scores in order to tailor support.

Debbie described this individualistic approach to raising attainment:

> *"Looking at the individuals really and ensuring that they are achieving what they should be achieving, and if they are not making sure that we put intervention strategies in place. So just tracking and assessment, making comparisons with their standardised test scores and utilising other subject data"*

Lauren summed up the outcome of raising attainment:

> *"So yes, I think it is very important as a middle leader that I am making sure that, without exception, every child can get the best set of qualifications they can".*

Subject

Both the CPT and their departmental staff are clearly engaged in raising attainment which demonstrates a culture of assessment in schools (Kintrea 2020) that emanates from government education policy. By defining teaching staff as the subject component within a CHAT activity, I attempted to explore the mediated actions (Postholm 2015) between the CPT and their departmental teachers.

To explore the mediating actions of departmental teachers, participants were asked about their awareness of the 'effectiveness' of their teachers in raising attainment. This provided me with an insight into how CPTs attempted to negotiate actions with their teachers but also revealed the necessity, at times, to issue non-negotiable directives.

Jaime described using tracking data to ensure teachers were reliably recording data:

> *"I would use tracking data and the best way to make sure that you're using it in the most effective way and encouraging them (teachers) to be really consistent".*

The mediated actions CPTs take to ensure that teachers are effectively engaged in raising attainment were discussed by participants. They liaise with their teachers through methods like annual interviews for professional development. During these annual meetings, agreements are negotiated around how teachers will take forward their own professional development.

Jaime described the need for the continued professional development of teachers:

> *"But more than that is the subject professional development, going to the website and understanding standards and using those to make sure that their (teachers) subject knowledge is up to date".*

Teacher professional development can leave the CPT with a dilemma. When is the right time to give the less experienced teacher responsibility for the high tariff higher grade class, which involve qualifications necessary for entrance to college and university, particularly when accountability in raising attainment is at stake?

Andrew explained this dilemma:

> *"I always think to myself, should I just say, like, you're doing the Higher and that's you developing their experience, which I should be doing. But out of fear of affecting attainment I don't do it. Like I would be mad to take Mary or Peter out of Higher all together and give the Higher to somebody who's less experienced and I never let Newly Qualified Teachers near the Higher either. So, I'm quite precious over it but probably in terms of like leadership and developing people, maybe I'm being a bit unfair there, I can maybe be better at that".*

Further mediated actions by CPTs include classroom observations of teacher performance that are negotiated and agreed with staff, as well as efforts to empower staff through negotiated distributed leadership opportunities.

Rob expressed the advantages of having teachers who are willing to take on extra responsibilities:

> *"I'm very fortunate because I have got staff themselves that want to lead things as well. So, I can give them the opportunity to do things and we are very much a team that sing from the same hymn sheet which really helps".*

Non-negotiable directives arose when CPTs were engaging with internal assessment pressures which required staff to provide the tracking and monitoring of pupils' performance and data in addition to the requirement for teachers to set targets for pupils based on each student's potential academic performance.

Once external exam results were available to schools, participants were clear that teachers were part of the pupil results analysis process, which provides CPTs the additional opportunity to analyse teacher performance. Given that the school year revolves around the annual SQA examination, the practice of CPTs in analysing attainment is rooted in past experience of

previous exam schedules and results. This can then influence both the conscious and unconscious decisions CPTs make within their practices (Nussbaumer 2012).

Some participants were able to describe a confidence in the practice of the data analysis they performed, not in isolation, but with their teachers.

Nicola described her department's collegiate approach:

> "*It was last year we started talking not about tracking and monitoring but tracking and mentoring. So, it's about having that personalised approach to the pupils*".

Most participants referred to using performance data to improve pupil attainment through a targeted approach described by Nicola. In terms of improving pupil attainment, this contradicts the argument of McCluskey (2017) who argues that the nature of policy promotion occurring at a school level ignores a targeted approach, thus rendering policies to raise attainment and close the attainment gap as ineffectual. The responses from participants illustrate how, at the school level, a targeted approach is very much the preferred strategy available to teachers in supporting the individual needs of their pupils.

Surprisingly, few participants directly described observing their teachers' classroom practice as a means of ensuring teacher effectiveness, despite the clear expectation that classroom observations take place (Bell et al (2018).

Rob touched upon a relaxed approach to observing teacher practice:

> "*We also pop in and out of classes all the time. We're not so good at doing the whole formal observations*".

It was clear to me that there was a certain confidence reflected in participants' responses to using data. This appears to be due to their previous experience of data analysis. The approach to monitoring and tracking pupil attainment and negotiating actions with teachers can also be considered in terms of how the practices of CPTs are influenced by their historical

experiences. These experiences, it can be argued, allow them to evolve their practices both in present and into the near future in their efforts to improve both pupil attainment and teacher performance.

I found Jenny's almost war-like approach in reflecting on her historical experiences to be particularly poignant.

> *"You build your capacity through the scars on your back, right. You've dealt with that issue before".*

Tools

The method of CPT practices in order to raise attainment relies upon the resources or tools that are available to them (Trust 2017). The tool component was defined in the interview question as the 'resources' that CPTs used in their departments. Here, I was interested in discovering if there were specific tools CPTs might identify as specific to raising attainment and also how CPTs used these tools to mediate their actions.

How tools are used by CPTs can be seen in the context of how they are influenced by their historical experiences of raising attainment, though past teacher performance and attainment data. Tools are adaptable within the CHAT activity and can be change over time to suit the needs influenced by the culture of the system (Foot 2014).

It also became clear that raising attainment, as a CHAT object, cannot be defined as a short term-goal for CPTs but, as Engestrom (2001, p. 136) describes, a 'moving target' which can change depending on a wide range of factors, such as changes to education policy, financial pressures, or staffing issues. This means CPTs must adapt their practices and the tools at their disposal.

In thinking about the tools used in raising attainment, almost all of the participants recognised teachers as their most important resource.

Angela described her departmental staff:

> *"I think it's the most important resource you have for everything. If you don't have staff who are motivated and competent, then nothing else matters and I would say it's the biggest thing that's going to raise attainment".*

A further tool used by participants was the financial budget allocated to departments and administered by the CPT as the budget holder. The CPT must decide how this budget is spent on resources, such as books and jotters, external resources bought in, or internally produced resources produced by teachers in developing the curriculum.

Andrew described the impact of the increasing cuts to departmental budgets.

> *"So, my money goes on jotters and photocopying and I'm really finding money quite tight now. In years gone people would say, can I get 30 of these textbooks I would find the money for it I would be able to. But now I'm actually saying no to people, I'm actually saying no I don't have any whereas years ago I would be able to do that but I think that's just the nature of Scottish schools at the moment."*

The external examining body, the Scottish Qualifications Authority (SQA), was also identified as a tool to ensure that the curriculum was up to date, ensuring that pupils were covering the correct course content required to pass the external examinations.

Teachers who were employed by the SQA as exam markers were seen as a particularly valuable tool as they would have a clear understanding of the SQA standards expected of pupils and were able to share this expertise with their departments.

The data produced within departments, such as the tracking and monitoring data generated by teachers and based on internal assessments, was also identified as a crucial tool used by the CPT to hold teachers accountable for

pupil performance, to monitor teacher performance, and to measure attainment across the department.

Division of Labour

The choices that a CPT has to make regarding teachers as one of their tools lies in how teachers are allocated to classes. For this research, this is defined as the division of labour CHAT element, which outlines who is doing what in the activity (Foot 2014).

A number of factors were described by the participants in their decision to allocate teachers to classes. Teacher experience was found to be the most common factor discussed by participants. The more experienced teachers tended to be allocated to the most academically able classes and the most senior classes in an attempt to safeguard pupil attainment.

Kim highlighted the role that the tool of data has in the decision-making process of teacher allocation:

> *"I've got to say it really is their past performance data in terms of how they've performed"*.

Allocating classes is seen as the norm for teachers. They remain with classes for two years when teaching the SQA National 5 courses which are taught to 14- and 15-year-olds. However, it is seen as beneficial to experience different teachers when moving to the Higher-grade courses for 16-year olds.

James explained this approach, but also recognised the benefit of the change for pupils after two years:

> *"I think it's good for continuity for two years because you know the names, you know their ability levels. After that I think it's good that they get a different experience"*.

Less experienced teachers, in particular newly qualified teachers, tended to be assigned lower tariff junior classes which would perhaps guard against a potential negative impact on attainment results in the short term. At some

point, newly qualified teachers must gain the experience required to teach the Higher qualification.

Jenny described taking the decision to begin developing the inexperienced teacher:

> *"Last year I made a choice to have two teachers deliver subject X, who had never delivered the full course themselves, and the reason for that is to develop that ability and capacity because we've got slightly fewer numbers."*

Angela revealed how careful consideration of class allocation can prove useful when considering the potential impact on CPT workload:

Angela described the peril of not allocating classes effectively:

> *"Giving any class doesn't work, it's not good for the member of staff, it's not good for the pupils and the class and then it's not good for me because I'm just going to end up having to intervene and help".*

Rules

The rules component of the CHAT activity system controls the actions of the subject (Foot 2014). Rules can be declared explicitly for subjects to follow or can be presented as guidelines which have been negotiated and collectively understood by the subjects (Trust 2016).

Participants were clear that an important source of guidelines in raising attainment externally originated from the SQA examination body which governs both the content of courses and the external examinations leading to qualifications.

Rob indicated the importance that the SQA plays:

> *"For me, the first port of call is SQA, what they're putting in their exam content."*

Debbie M echoed the importance of the SQA:

> *I think the SQA have a massive influence because we are teaching to what the SQA are telling us".*

Participants were also clear on the importance of understanding the standard of candidate responses expected by SQA in order to secure a pass in SQA examinations. The SQA provides a micro website dedicated to understanding the SQA assessment standards, which can be accessed by both teachers and candidates (Scottish Qualifications Authority 2010).

While participants expressed the importance of securing the best attainment outcomes for pupils, participants were also mindful that external examination performance was tracked not only by the school but also the local authority to whom schools are held accountable and who compile their own league tables of school attainment performance. However, this is not seen as important.

James' comment illustrated this importance:

> *'I think ultimately still having the external assessment is always going to influence because we're still being measured on that success of the final exam'.*

A few participants identified Education Scotland as a tool, commenting that there was little that impacted their actions despite Education Scotland being responsible for quality and improvement in education, in particular through school inspections (Education Scotland 2023). More significant was the GTCS Standards which participants recognised not only in terms of their own middle leadership standards but also regarding the standards for teachers, providing a benchmark with which to assess teacher performance, especially the early years of teaching.

Kim recognised the application of the GTCS Standards:

> *"The GTCS in terms of I mean, they give you your standards for middle leaders or you know for the lifelong learning of your staff".*

In terms of internal rules, participants agreed that the school improvement plan had an impact on their actions. The school improvement plan leads the strategic direction of the school and CPTs are obliged to include specific aspects of the school plan in their own departmental plans. This ensures that the strategic goals of senior management are being carried out through the middle leaders.

Education policy, as a major factor in controlling the actions of subjects, was not highlighted explicitly by any of the participants. Policy enactments, such as the Pupil Equity Fund (PEF) or the NIF policy, did not feature in any of the discussions around the rules mediating the actions of CPTs. This may be due to the distance created between policy and the CPT. As education policy text is transformed by local authority plans and then by school and departmental improvement plans, policy becomes re-packaged into the actions taken by teachers to enact the policy (Bell 2012).

Community

The community component of a CHAT activity reveals a shared interest in the success of the Scottish Government policy of raising attainment (Avis 2007). From participants, there was a clear understanding of the community of which they are essentially at the heart of.

As members of the internal school community, teachers, as stated previously, were recognised by CPTs as their most important resource and as the group who drive forward raising attainment, learning and teaching, the development of resources, and contributing to the whole school community.

The senior leadership team (SLT), as part of the internal school community, was recognised as the authors of the strategic focus of the school through the school improvement plan to which CPTs must adhere to when formulating

their own departmental improvement plans. The SLT also place demands on CPTs to ensure procedures are being followed, such as the tracking and monitoring of attainment data which in addition to departmental analysis provides SLT with a means of holding CPTs accountable for departmental performance. In addition, also recognised was the role SLT played in providing support to CPTs.

Kim interestingly described how both SLT and teachers can impact the CPT, which echoes the position of the middle leader as defined by De Nobile (2021) and Forde et al (2018):

> *"I think that you're a middle manager right, so you've got kind of pressure from above like your senior leadership team and then you've got your own staff and it's almost like you're that man in the middle".*

Debbie H described another role of the senior leadership team as providing:

> *"a clarity of vision of what we are supposed to do and you have that singular purpose".*

Participants identified a dual role in senior leadership as both a source of pressure and of support and advice. Rob highlighted the opportunity in *"seeking advice from senior leadership"* when support was needed.

As well as pupils, parents and carers are clearly at the heart of any school community (NIF 2022). Participants recognised this in the context of parental involvement and other teaching staff within the school with remits such as learning support and pupil support. Importantly, this illustrates the connectedness of the school staff to the pupils in the school community.

Rob's response encapsulated this community and relationship:

> *"You take on board what parents would like to see and their opinions of what's happening with their child and working with link deputes (SLT) for that year group and then the pupil support teachers to get to create that network".*

Externally, participants created partnerships with other schools which were used to compare SQA results or to share good practice, which HMIE terms as 'looking outwards', and SLT actively encourages (Education Scotland 2015).

The local authority in their demand for attainment data was recognised as a source of pressure on CPTs to raise attainment. Interest from local authorities in raising attainment arises from their own accountability in implementing education policy for which they have their own targets displayed for public scrutiny in their own education improvement plans.

Debbie H described the influence of the local authority:

> *"In terms of the Council, I think the tracking for sure, I think, they're really involved in terms of what they expect of a team within the school and of individuals with the grades and progression and all of the statistics and things that are shared with us".*

6.5 The Practices of the CPT as a CHAT Activity

The systematic analysis of the participants' responses defined as components of a CHAT activity led me to consider the possibility of constructing the practices of the CPT in raising attainment as a 2nd GENCHAT activity system which can provide a study of the individual (Spinuzzi 2019), in this case of the practices of the CPT. CHAT analysis is also a useful tool in understanding qualitative data which explores 'human activity within a collective context' (Yamagata-Lynch 2007, p. 435).

Using the components of CHAT as the foundation of the interview phase allowed me to develop a sense of how CPT practices were mediated by both cultural and historical artefacts, in addition to the impact of tensions and conflicts within the activity (Postholm 2015).

While the individual components of CHAT have been explored and the potential conflicts and tensions identified, Foot (2014, p. 3) argues that 'The essential task of CHAT analysis is to grasp the systemic whole of an activity,

not just its separate components'. As such, identifying the object component of the CHAT activity should be the first priority which sets the context for the actions taken by all of the actors within the activity (Lee 2011).

Having clearly identified the CHAT object element as raising attainment, I focussed on presenting the practices of the CPT as a 2ndGEN CHAT Activity.

Figure 6.1 (in section 6.6: 'Discussion') illustrates the dialectic between the components of the CHAT activity system and how these components provide a theoretical understanding of the practices of the CPT in their middle leadership role. Figure 6.1 further presents an illustration of the practicalities of how CPT practices are enacted. The interview data offers an understanding of the thinking behind the decisions that CPTs take in attempting to achieve the object of raising attainment.

6.6 Chapter 6 Discussion

6.6.1 Leadership and Management

From the first two interview questions which focussed on the GTCS definitions of leadership and management, it was clear that CPTs expressed familiarity with GTCS definitions and could recognised these definitions confidently in their own practices. In addition, these interview questions supported the confidence levels expressed by participants in the online survey.

Participants were able to confidently describe in detail common management practices in their role, such as measuring pupil performance, time management, and notably the administrative tasks that have continued to be part of the middle leadership role since the work of Bennett in 2007. These management tasks were identified as daily and routine but also as time consuming and requiring constant priority in order to meet deadlines. These administrative tasks were something that participants took ownership of and did not appear to delegate to departmental staff. This may be due to the

level of responsibility placed on CPTs to ensure these administrative tasks were completed correctly and within deadlines.

In their leadership role, participants described common practices which could be both short or long term within the context of the department, school improvement plans and, ultimately, education policy goals. Participants were also confident in creating a vision for their departments and were keen to include their departmental staff in the process. This demonstrated an understanding of the need for CPTs to distribute leadership which provides opportunities for the professional development of staff (Harris 2014), but also to encourage ownership of the departmental vision.

As a factor embedded in the culture of Scottish education policy, self-evaluation is closely associated with school improvement (Holly & Hopkins 1988). Participants were very confident and clear on how the data they collected was analysed and used in order to self-evaluate departmental performance with the added expectation that self-evaluation could or would lead to implementing improved strategies for raising attainment.

6.6.2 CHAT Analysis of CPT Practices in Raising Attainment

The practices of the CPT were identified, defined and explored within the context of a CHAT activity system imbued with and influenced by the cultural, historical and political factors identified and embedded within the Scottish education system and, in the case of this study, the NIF policy.

The CHAT framework used to analyse the interview data gave not just an understanding of the physical processes that CPTs were involved in but also an insight into the cognitive processes of how practices evolved and were rationalised by CPTs. Moreover, the CHAT framework facilitated a theoretical insight into the under-researched complexity of the practices undertaken by the CPT within a system of sometimes competing and sometimes complimentary CHAT elements. The theoretical insight of this

study provides a response to the call by researchers such as Harris et al (2019) for a more theoretical approach to middle leadership research.

Given that raising attainment is central to Research Question 2 of this study, the importance of raising attainment as the outcome element of the CHAT activity is clear. The CHAT activity analysis reveals how raising attainment influences virtually every aspect of the role and practices of the CPT. This overarching importance lies within the culture of a Scottish education system in which academic exam performance is recognised as defining the life chances of young people, in particular in measuring the gap between the most affluent children and those in poverty (McCluskey 2017). As such, government oversight in the form of accountability at all levels of the education system is used to measure attainment as a barometer of the success or failure of education policy whose aim is to reduce the persistent problem of the poverty-related attainment gap in Scotland (Scottish Government 2022).

The CHAT object element of raising attainment influenced both the management and leadership capacities of CPTs and instilled pressure on them to use a variety of elements to measure attainment effectively. Measuring attainment data both internally and externally was a perpetual practice and one which CPTs relied heavily on in their decision-making processes, culminating in the practices which CPTs formulated and then implemented. The historical nature of attainment data meant that CPTs could be pressured to introduce new elements or re-shape other activities in an effort to develop strategies which would achieve improvements in attainment in the future.

One of the key practices of the CPT involved negotiating with teachers as the subject element of the CHAT activity. This ensured that teachers were held accountable to the CPT for their performance but could also access the support and direction of their CPT to achieve their own optimal performance through professional development and leadership opportunities.

A further CHAT element closely related to the subject element was the division of labour. CPTs would make arbitrary decisions on class allocation based on their own judgements of teacher performance but would also negotiate these actions with their teachers in what could be a difficult conversation. Interview responses revealed the cognitive insight in how the CPTs allocated their teachers to classes based on factors such as teacher experience, in addition to the analysis of historical attainment data which demonstrated perceived teacher effectiveness based on the number of exam passes secured by the teacher. Hirsch & Bergmo-Prvulovic (2018) argue that middle leaders can experience resentment from classroom teachers who may see middle leaders, who have the power to delegate tasks and issue directives which affect them, as remote. However, there was no evidence of resentment expressed in this research by CPTs; rather, they expressed a positive, collegiate ethos within their departments.

Actions within a CHAT activity system require the use of tools with which to pursue the object and the outcome (Foot 2014). In ensuring that the negotiated role of teachers was effective, CPT practices included the provision of teaching tools through the financial budget which were used to transform the object of raising attainment into the outcome of improved attainment in SQA exams. As well as providing existing tools, CPTs must also provide the means to form new tools which may be more effective in achieving the outcome (Trust 2017).

Additionally, it must be recognised that both the financial budget and performance data were available to the CPT as tools help facilitate teacher effectiveness. These tools can be seen as a source of contradiction for CPTS as they can both empower the CPT in their decisions in providing resources but can also act as constraints given the limitations of a financial budget as described by participants and when relating performance data to teacher performance, which can limit how the CPT deploys their staff.

Clearly no organisation can function without defined rules which act to regulate participation in the community (Trust 2017). For the CPT, some of

these external rules must be adhered to strictly, for example in terms of defined SQA curricular content, deadlines and external examinations, which incidentally fall into the realms of the managerial role. Other internal rules are negotiated and require the CPT to attempt to reduce tensions within the school community which relies on the 'leadership resources' of the CPT, as defined by Leithwood (2016), in negotiating with teachers on aspects such as professional development, distributed leadership, or the allocation of classes.

The rules CHAT element also highlights the tensions of the middle leadership role of the CPT which Grootenboer (2019, p. 253) describes as being the 'bridge and broker' positioned between senior leadership and teachers to mediate conflicting views on how school improvement and raising attainment can be achieved.

Teachers and senior leadership, together with parents, pupils and the local authority, form the internal community element in which the CPT operates. These individuals all have a shared interest in the outcome of the CHAT activity system (Trust 2017). The findings demonstrate how the community can be a further source of pressure for the CPT when making decisions on practices which must satisfy the community who have a collective shared interest in raising attainment.

This community pressure can be seen as a further aspect of accountability, one which can be seen as necessary and legitimate, particularly in the case of parents who wish to be involved in the education of their children (Cameron et al 2022). Parental involvement in Scotland is enshrined in law through the Parental Involvement Act (2006), which recognises the importance of parental involvement in supporting learning (The Scottish Government 2018). As such this legislation provides further pressure within the community element which the CPT must also consider in formulating their practices.

6.6.3 Practices of the CPT as a CHAT Activity

Presenting the practices of the CPT as a CHAT activity system (Figure 6.1) provides a contrast to the criticisms of Forde et al (2016) that Scottish education policy provides nothing more than a list of tasks for the middle leader. The 2ndGEN CHAT activity system presented provides cognitive insights and a historical and cultural context into how the CPT uses the tools available to them in order to mediate their practices (Mwanza 2002). This representation of the practices of the CPT is also in contrast to the Middle Leadership in Schools Model developed by De Nobile (2021), which attempts to define leadership by its processes rather than an understanding of why and how middle leaders do what they do.

It became clear to me that the measurement of raising attainment through examination results, whether internal or external, dominates the culture of schools and was reflected in the importance placed on raising attainment by the participants and which influenced their practices heavily. This is a view echoed by Biesta (2015, p. 12), who argues that the 'rise of the measurement culture has had a profound impact on practice'.

Through a CHAT analysis of the practice of the CPT, it was evident that there was a reliance on historical internal and external attainment data which informed both present and future practices of the CPT. However, while Biesta (2015, p. 15) argues that discussions around education practice has become increasingly focussed around 'factual data', I believe this research demonstrates there is a range of factors which a CPT must mediate when making decisions regarding their practices. Ultimately, it is for the CPT to both navigate the meanings of quantitative 'factual data' while continually mediating the qualitative experiences and demands of the actors within the CHAT activity system; more specifically, teachers, parents and pupils within the school community.

This CHAT activity presents the practices of the CPT as the separate and definable elements which influence the practices performed by the CPT in

attempting to raise attainment. The cognitive context by which the CPT arrives at the practice decisions they make can be understood through the analysis of how these CHAT elements are negotiated and re-shaped by the CPT. Further understanding can be seen in how the CPT utilises the power imbued within the managerial and leadership features of the middle leadership role defined by the GTCS Standards for Middle Leadership and by Scottish education policy.

How the historical and cultural factors embedded within the NIF policy and the school system influence the practices of the CPT are also evident. Foot (2014, p. 331) argues that cultures are grounded in histories and as such what people do within an activity at any one time must consider the 'historical trajectories' in which their actions take place. The trajectory taken by the CPT can be understood in this research in the context of the academic session through the historical nature of the attainment data collected within the culture of a Scottish education system, which relies on external exam performance as the indicator of improvement in attainment.

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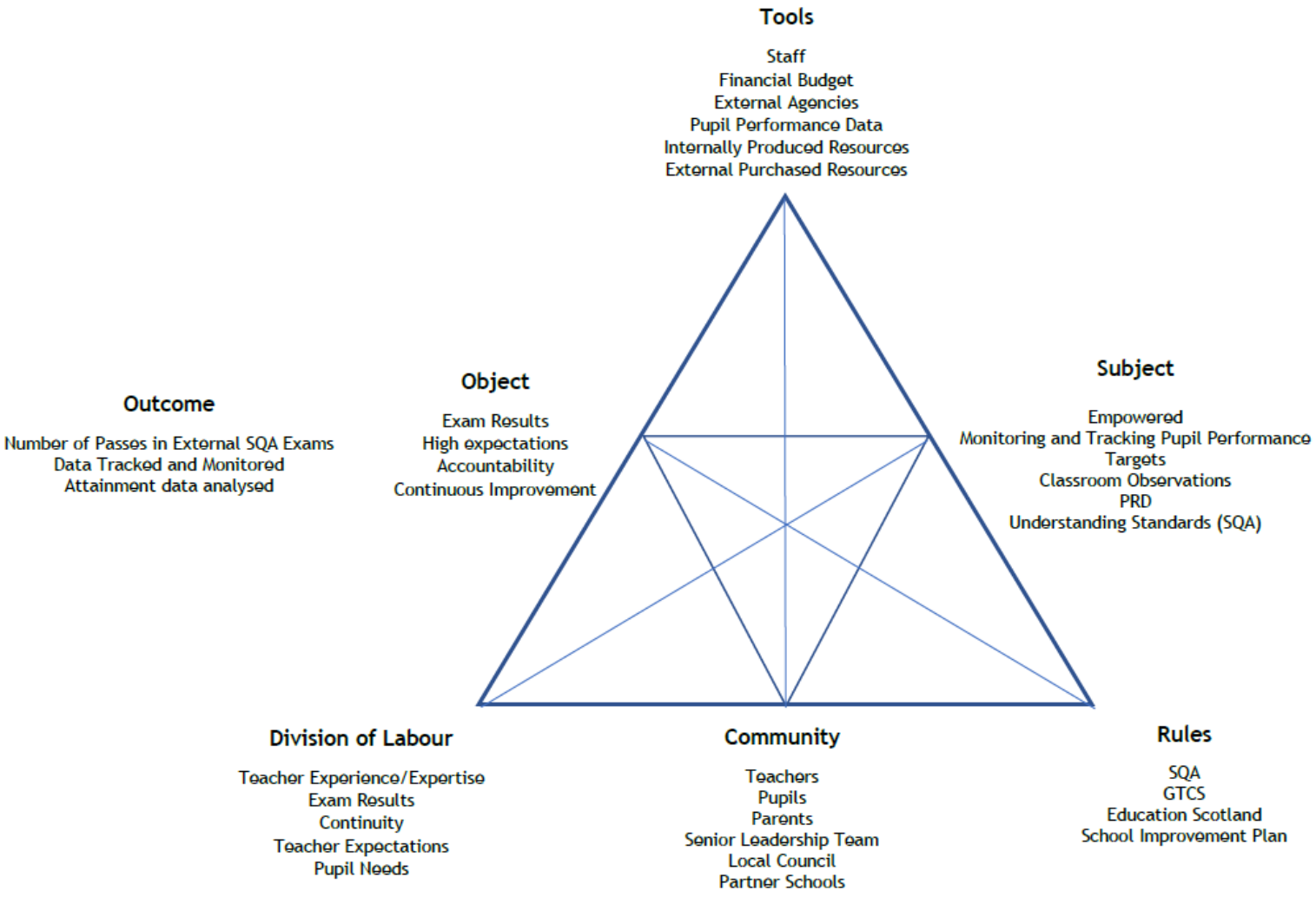

Figure 6.1 2nd GEN CHAT Activity of the Practices of the CPT in Raising Attainment

6.7 Chapter 6 Summary

The purpose of the first two questions of the interview was to explore the middle leadership activities of leadership and management. The responses to these questions by participants clarified that both roles continue to have a significant part in the role of middle leadership, with particular emphasis on the management activities described by Bennet in 2007.

Analysis of the interview data using the elements of CHAT was successful in providing knowledge of the practices of the CPT in raising attainment. Postholm (2014) argues that this is what CHAT analysis is capable of, not in constructing truths but in providing useful knowledge. By using the elements of CHAT in the formation of the CPT interview questions, the contexts, influences and challenges as described by Miller & Hancock (2018) were revealed. This allowed the practices of the CPT to be understood in the context of the raising attainment. It also categorised them into components and reshaped the practices influenced by government policy.

The CHAT activity reveals the practices of the CPT as separate and definable elements and shows how these practices were influenced by the policy of raising attainment. The cognitive contexts through which the CPT arrives at their practice's decisions were revealed through the analysis of how the CHAT elements were negotiated and re-shaped by the CPT. Further understanding can be seen in how the CPT utilises the power imbued within the managerial and leadership features of the middle leadership role as defined by the GTCS Standards for Middle Leadership and Scottish education policy.

The influence of the historical and cultural factors both within the NIF policy and within the school system on the CPT provides further insight into how the practices of the CPT are guided by the Scottish education system and its policies. Foot (2014, p. 331) argues that cultures are grounded in histories and, as such, what people do within an activity at any one time must consider the 'historical trajectories' in which their actions take place. The trajectory

taken by the CPT can be understood in this study in the context of the academic session through the historical nature of data collected from previous years and through the culture of a Scottish education system, which relies predominantly on external exam performance as an indicator of raising attainment and school improvement.

Chapter 7 Overarching Themes

7.1 Chapter 7 Introduction

This chapter discusses the cultural, historical and political themes constructed from the data analysed in the study. Given the significance of historical and cultural themes within the CHAT approach it is no surprise that these themes could be drawn from the raw data to support the CHAT theoretical approach to middle leadership practices of the CPT. A political theme was evident from the NIF policy critical policy analysis, providing a further perspective in positioning the CPT in Scottish education policy. This chapter also provides an overview of the process involved in providing a visual representation of how these themes were developed from the data.

As described in Chapter 3, Gioia et al (2012) suggests the creation of a visual representation of the progress of raw data to themes represented as a 'data structure' thus allowing for a more explicitly theoretically informed approach which illustrates the relationship between phenomena.

In presenting a data structure for this study, the raw data were defined as codes from elements of a 2ndGEN CHAT Activity (Trust 2017), subsequently developed as cultural, historical and political themes. The data structure then provides a visual means by which to illustrate how the raw data from this study were systematically developed into both codes and then into themes (Gioia et al 2012).

Figure 7.1 below demonstrates how data were extracted from both the CPT interviews (black text) and the NIF critical policy analysis stages of the research (blue text) and then defined in Nvivo using the elements of the CHAT activity as codes. One of the additional benefits of creating codes using Nvivo was the ability to then analyse the data further to identify themes (Smyth (2006). I avoided the data structure headings used by Gioia et al (2012, p. 21) who defined their themes using the term 'Aggregate Dimensions' and codes as '2nd Order Themes'. For my study, I do not believe

these definitions to be suitable and so in the interest of clarity, I used the existing terms of this study which were ‘Raw Data’, ‘Codes’ and ‘Themes’. Thus the relationship between the codes of the CHAT activity and the underpinning themes identified from the CHAT analysis as cultural, historical, and political were demonstrated.

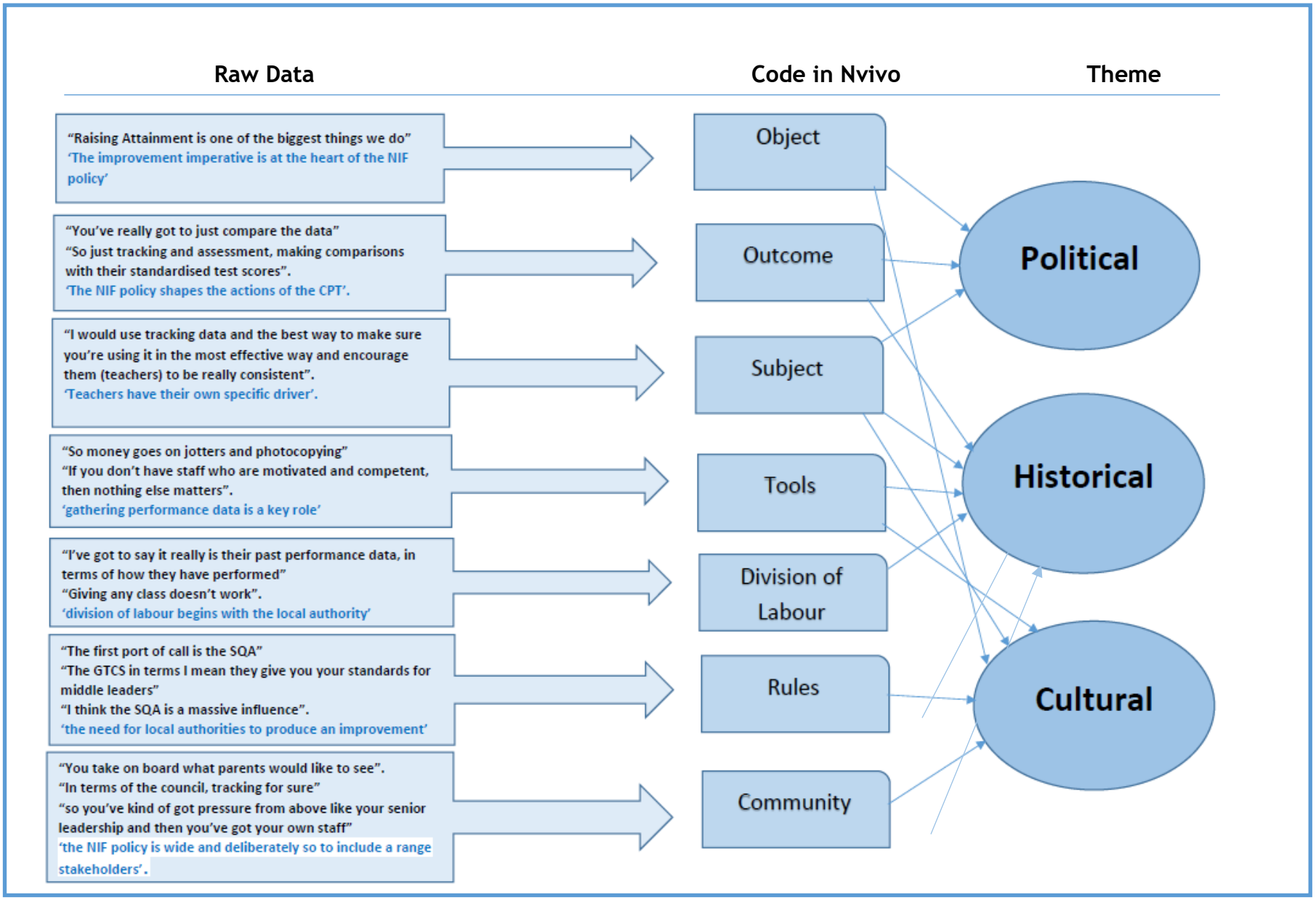

Figure 7.1 Data Structure of NIF policy and Interviews (Gioia et al 2012)

7.2 Political Theme

Like education systems globally, education policy in Scotland stems from state control (Arora-Kukreja 2022). Clearly, there is a strong political influence which emanates throughout education policy and cascades from government all the way into the classroom. In the context of the NIF policy, the influence on schools is clear. Closing the poverty gap as a flagship policy of the Scottish Government has resulted in the belief that the education systems can be utilised to reduce poverty through raising attainment (McCluskey 2017).

In terms of demographics, 17% of the Scottish population is under the age of 16 with 25% in relative poverty (Scottish Government 2021). Therefore, it is clear that these demographic factors have an influence on the Scottish Government, hence the NIF policy attempts to close the poverty related attainment gap through raising attainment. However, Mowat (2018) concludes that it is unrealistic to assume that 'closing the gap' could be achieved through a focus on schools and young people to the exclusion of society at large.

The political theme evident in this research is demonstrated through the practices of the CPTs which are embedded in the political imperative to raise attainment. Given that the NIF policy relies on the production and analysis of data (Priestly 2015), CPT practices are geared towards those practices which will generate performance data from pupil assessments which can then be analysed. Practices can then be developed or re-shaped as a result to improve raising attainment. These CPT practices directly influence what happens in the classrooms of teachers and thus demonstrate the reach of the political aims of government into the classroom.

The politically driven education system is in danger of allowing schools to become 'the sites of the political', argues Arora-Kukreja (2022, p. 492). She contends this may become the case as a result of parent as 'political agents'. The notion of schools as 'the site of the political' was one that resonated with me. I would argue that schools are already political sites, and always have been given the influence of 'political agents' in the form of policy makers. This is

demonstrated by the influence of the Scottish Government's aspiration to reduce poverty through raising attainment together with the added pressure of accountability, both of which influence schools and, more specifically within the scope of this study, the practices of the CPT.

7.3 Cultural Theme

From the research, it became clear that the exam culture in Scottish education is suffused with the improvement imperative which has been prevalent globally in schools now for decades (MacBeath 2008). In Scottish schools this appears to be evident through a culture which has developed. Schools perpetually strive for improvement through the generation, tracking and monitoring of pupil performance data which culminates in the measured success or failure in external exams.

The value placed on generating performance data based on pupil attainment is clearly embedded within the culture of the Scottish education system. In defining performativity in education, Ball (2003, p. 216) points to the need to control the judgements of quality or value as 'crucial' and asks who decides what is measurable? In the Scottish context, the control of judgements is determined by the Scottish Government (McCluskey 2017) and evident in the NIF policy text requirement for data.

The culture of performativity and improvement are familiar to policy makers who use data to revise their policies and gauge success, while within schools, data is used to reflect on and improve practices. Therefore, the generation of performance data perpetuates the culture of accountability at all levels within the system from the classroom teacher to local authority. This creates tension for a Scottish government keen to formulate egalitarian policies which reject the notion of neoliberalism (Watson 2010) and ultimately promote social and economic change within the context of free market conditions (Connell 2013). As Mowat (2018) states Scottish education policy, like other countries, is not immune to the need to be competitive in a global market economy.

Mowat (2018, p.53) also describes a culture of 'contrived collegiality' arising from the dispersion of power across the system. This dispersion of power is perpetuated by means of annual reviews of improvement plans at all levels, from national government through local authorities to schools and eventually to the CPT in the curricular department.

In addition to the school and the policy makers, pupils, parents and local authorities form the community have an interest in improvement and raising attainment in schools. These school community members share in the culture of the activity system through the expectation that improvement and raising attainment will be a reality improving the life changes of young people (McCluskey 2017). In particular, there is perhaps a greater expectation of improvement from parents arising from a belief in the politicians and local councillors they have voted for and the schools they have financed through their taxes. Ultimately, the deep-seated exam driven culture of Scottish education casts a long shadow over schools. It is under this shadow where schools must continually improve and raise attainment.

7.4 Historical Theme

Exploring the historical perspective of the CHAT activity is 'invaluable' in understanding the cultural context of the activity system (Foot 2014, p. 343). Historically, the Scottish education system is cyclical in nature, much like many education systems globally which revolve around an academic year ending with a diet of examinations followed by a summer break and release of external exam results. The CHAT activity of the CPT practices in this study revealed a historical perspective in which schools spend much of their time reflecting on the historical data of the past academic year's performance gathered from both internal and, more importantly, the external source of exam results. This data analysis serves to both to gauge the success of previous improvement strategies and plan future strategies.

Historical data analysis for the CPT allows the CPT to reflect on previous practices in order to re-shape or renew the range of practices in current use

to raise attainment. These practices might include those described by the participants such as how labour is divided among teachers based on performance, developing new methods for teaching and learning, or the development and implementation of new curricular tools.

Classroom teachers as part of the data analysis process are also aware of the power of historical data, which also acts as a measure of their own teaching performance and understanding of subsequent actions by the CPT which may ensue as a result. For the CPT, this mutual understanding of historical data is important as this gives context to their motives and the subsequent practices enacted to raise attainment within the department.

Education policy displays an important historical theme through the ability of policy makers to ingrain accountability within the Scottish education system (Kintrea 2020). Accountability now reaches every level in the education system (Tatto 2012), from CPT accountability to senior leadership (Harris et al 2019). The persistent nature of accountability viewed through the historical theme can also explain how accountability, through its persistent presence in policy, has also become part of the culture of the school (Skerritt 2021).

A further aspect of the historical theme can be identified around the policy imperative for accountability. The NIF policy, while promoting what Biesta (2015, p. 52) describes as a 'public service approach', appears to be more in tune with what Biesta (2015) describes as the historical change from public service to a more managerial 'customer-oriented ethos'. This essentially means that the CPT has had to become cognisant of both an internal managerial accountability and an external public service accountability, particularly in terms of parents and the community.

7.5 Chapter 8 Summary

Discovering the overarching themes within this study made it possible to investigate the elements of the CHAT analysis in the context of the political,

historical and cultural factors which influence both the policymakers and the CPT as a policy actor.

In identifying themes, it is possible to reveal concepts which do not yet exist in current literature (Gioia et al 2012). Within this study, given current literature on middle leadership, discovering themes which can influence the practices of middle leadership provides a potential new facet to this area of research.

Chapter 8 – A 3rdGEN CHAT Activity System

8.1 Chapter 8 Introduction

Chapters 4 and 6 presented the NIF policy and the practices of the CPT as separate 2ndGEN CHAT activities, revealing the relationships between individuals situated within a cultural, historical context and in their communities (Nussbaumer 2012). The culmination of exploring the research questions is presented here in the form a 3rdGEN CHAT activity system which demonstrates the NIF policy and the practices of the CPT together, which Nussbaumer (2012, p. 39) describes as a 'network of interacting systems'. The interconnectedness of these two activity systems allows for additional discussion of the power and mediated actions which permeate throughout the3rdGEN Activity system.

The 3rdGEN activity system presented here also effectively illustrates the position of the CPT within the NIF policy while providing a theoretical framework to understand the practices of the CPT revealed through the shared object of closing the attainment gap.

8.2 3rdGEN CHAT Activity System - The National Improvement Framework policy and the CPT

Third generation (3rdGEN) CHAT has been criticised as moving away from the analysis of the individual, as in 1st GEN and 2ndGEN CHAT, to the analysis of organisations (Spinuzzi 2019). However, Engestrom (2001) originally argued that a 3rd GENCHAT activity system has the ability to represent the relationship between the individual and the networked system or organisation with which the individual interacts. This relationship can then illustrate a 'collective meaning' through a shared object (Engestrom 2001, p. 136).

Having systematically explored both the NIF Scottish education policy and the policy objective of raising attainment on practices of the CPT, I was able

to present two distinct 2ndGEN CHAT activity systems. I then attempted to present the 2ndGEN activity systems as a 3rdGEN CHAT Activity system representing the dialectic relationship between the NIF policy and the practices of the CPT. This is a relationship connected through the shared CHAT object of closing the attainment gap.

The 3rdGEN CHAT activity system presented in Figure 8.1 offers what Engestrom & Sannino (2021) define as 'constellation' of two activity systems. This represents an exploration of the CPT cognitions leading to the mediated practices necessary in attempting to fulfil the shared outcome of 'Closing the Attainment Gap' of the NIF policy, achieved through the object of raising attainment. This is somewhat in contrast to Engestrom & Sannino (2021) who, in representing their CHAT activity, depict two organisations, a hospital and a health centre, who have the same object leading to the same shared outcome.

In contrast, in this research a difference that arose was a constellation that occurred between an individual in the form of the CPT and a networked system in the form of an education policy which by virtue of the distance between them may have different objects. However, in analysing the 2ndGen CHAT activity systems, a common outcome of the 3rdGEN activity system was the NIF policy academic outcome of closing the attainment gap, achieved through raising attainment ('Education: improvement framework and plan - 2021 - gov.scot' 2021).

Caution must be acknowledged that the actors within an activity system, while having a shared objects or outcomes, may have differing motives or be operating within differing timescales (Spinuzzi 2019). The analysis of the NIF policy highlights the changing nature of policy over a government cycle, which Spinuzzi (2019) argues can result in instability within a third-generation activity system. Spinuzzi (2019) argues that to solve this the potential problem, the issue of unstable actors should be addressed. For the purposes of this study, stability rests upon using the most up to date version of the NIF policy which was used for analysis purposes in this study. The

3rdGEN activity system created for this research (Figure 8.1) provides a snapshot of the relationship between the 2021 version of the NIF policy and the practices of the CPT connected by a shared object.

The 3rd GEN activity system presented here was achieved by analysing the commonalities between the 2ndGEN CHAT activity systems of the NIF policy and the practices of the CPT. The principles which Engestrom (2001) argued are necessary for 3rdGEN CHAT, and discussed more fully in Chapter 2, were explored throughout the analysis process and clearly described. In particular, the prime unit of analysis for this CHAT activity system is represented here as a collective artefact-mediated and object-oriented system which identifies the collective outcome of both the 2ndGEN activities systems as 'closing the attainment gap' (Scottish Government 2021), achieved through raising attainment.

As a theoretical exploration of middle leadership, this 3rd GEN CHAT Activity system of the CPT and the NIF education policy illustrates the position of the middle leadership role of the CPT in Scottish education policy and provides a more theoretical understanding of the middle leadership practices of the CPT in the implementation of education policy.

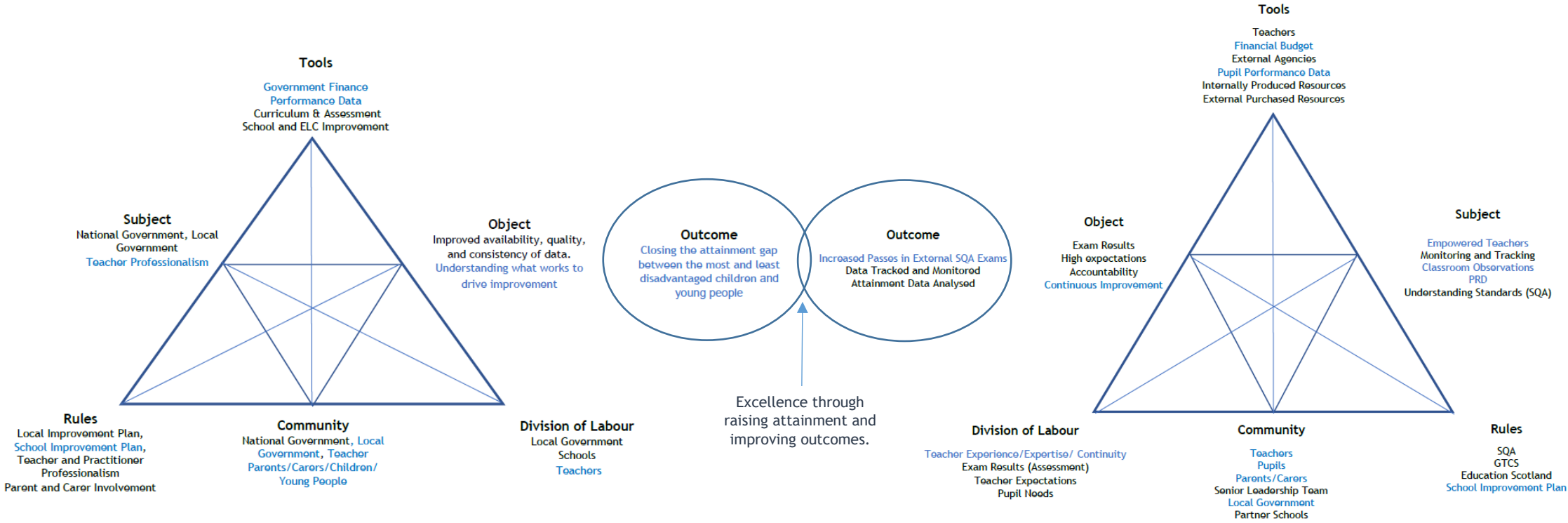

Figure 8.1 3rdGEN CHAT – The NIF Policy and practices of the CPT.

8.3 Mediated Actions and Power within the CHAT Activity System

Outcome and Objective

Within the 3rdGEN activity system (Figure 8.1), while the objects of each CHAT activity include differing mediated actions, including 'improvement through raising attainment and improving outcomes' (Scottish Government 2022), the shared mediated action of both the NIF policy and the CPT demonstrates the partially shared object required of a 3rdGEN activity system (Engestrom 2001). As stated in Chapter 2, schools are under pressure to improve (Murphy et al 2015). Therefore, the relationship between improvement as part of the NIF policy and the practices of the CPT can be defined as the mediating action used and transformed by the CPT to raise attainment driven by imperative of the NIF policy to close the poverty-related attainment gap. The CPT uses the power associated with their position, influenced by their own cultural and historical experiences which mediate their actions (Postholm 2015). This power is used in leading and managing their teachers in areas such as allocating teachers, setting deadlines, or quality assuring teacher performance. The mediated actions of the CPT can be seen in the context of how power is distributed within the education system from national governments to the school. However, this autonomy from government comes with the addition of higher levels of accountability (Mowat 2018).

Subject

The NIF policy recognises the requirement for teaching professionalism to enact policy objectives. The GTCS standards require ongoing professional development in the form of career long professional learning (CLPL) which attempts to ensure the quality of teaching professionalism expected by policy makers (Scottish Government 2022). This includes ensuring teaching professionalism is mediated in schools through the annual Professional Review and Development (PRD) process. The power within these meetings lies with the CPT who leads it and both judges the progress made by the teacher while suggesting and agreeing to next steps. In perhaps a more shared approach to the distribution of power, there

are the efforts through PRD to empower teachers with leadership opportunities, which involves distributed additional responsibilities that are essentially now seen as part of a teacher's role (GTCS 2021).

Tools

Finance and data are vital tools evident in both the NIF policy and CPT CHAT 2ndGEN activity systems. Miles (2020) defines tools in terms of their ability to represent basic operations defined as either primary tools or tertiary tools which shape the identity of an activity. Finance as a primary tool is required for the basic operations of any government and its institutions, including schools. The finance tool in the form of the departmental budget is the responsibility of CPT and used to finance the primary tools needed for the department to function. Power in this instance lies in the mediating actions the CPT must undertake in prioritising how best to allocate their budget in order to maximise the quality of learning and teaching required to raise attainment.

Tertiary tools help to shape the identity of CHAT activity systems (Miles 2020). Performance data can be defined as a tertiary tool in both the NIF and CPT 2ndGEN CHAT activities systems as it is used to define the success or failure of raising attainment in schools and closing the attainment gap of the NIF policy. Data is viewed as a crucial element in measuring the attainment gap at a national level (Mowat 2018), but also at the departmental level.

Power at this point can be seen as emanating upwards from CPT back to the national government level given that policy makers are effectively at the mercy of how policy is reconstructed by the actors in schools (Ball et al 2011). Ball et al (2011) characterises the power within schools in ensuring that policy enactment in is tailored to give longevity to school objectives in the face of the ever-present threat of policy changes.

Division of Labour

The clearest mediated action within the 3rdGEN CHAT activity system reveals teachers to be at the heart of both 2ndGEN activity systems which are focussed on raising attainment and continual teaching professionalism. Teachers, in terms

of their professionalism, are one of the 'key drivers' for improvement within the NIF policy and in being identified in government policy relinquishes power, and accountability, from government to teachers at all levels from senior leadership through middle leadership to the classroom teacher (Scottish Government 2022).

Rules

The power within the NIF policy requires schools to produce improvement plans which can be regarded as both a mediated action and also as a tool used to develop the rules within schools to achieve improvements and raise attainment. School and local council improvement plans contain drivers lifted directly from the NIF policy, giving clear references to the NIF policy object. Therefore, power emanates from the NIF policy and can be traced directly into schools and manifested within the school improvement plans which contributes to defining and shaping the vision of the school. Postholm (2015) notes how tensions can result when policy reaches the school, which may conflict with how schools wish to take forward their own agendas.

Community

The community is at the heart of the school as a public sector organisation represented in both government education policy and the school improvement plan. The 3rdGEN CHAT activity illustrates how both the NIF policy and CPTs are invested in and accountable to the communities they serve and recognises the power that communities have within the system. Parents and carers have expectations which are both culturally and historically embedded in the democratic process in Scotland.

From a political stance, if the expectations of community members in engaging with policy are not met, a government could ultimately find itself voted of office. The Scottish Government therefore makes sure that parents and carers, as voters, are aware of their education policy such as the NIF and the imperative to close the poverty-related attainment gap. The mediated actions and power of the community is evident within the 3rdGEN CHAT activity in illustrating how education policy was influenced by the political promises the Scottish

Government made to parents and carers, such as the challenge of the First Minister Nicola Sturgeon for voters to judge her on her record on education (McNab 2015).

Within schools, the power of parents and carers is more immediate when parents have parental rights enshrined in Scottish law, such as the right to 'receive advice and information about their child's education', which can be invoked by parents at any time (The Scottish Government 2020). The mediated actions of the CPT therefore also recognise the rights and demands of parents and carers who expect the best attainment outcomes for their children. They must be prepared to engage with parents who can apply pressure given their knowledge of the political promises to raise attainment for their children.

8.4 The position of the CPT in the National Improvement Framework policy

How the CPT is positioned in Scottish Education policy can be understood in terms of how the NIF policy writers are influenced by their own historical and cultural experiences of the Scottish education system, either consciously or unconsciously. These experiences may provide policy makers with an expected understanding of how their policy will be enacted at both a local authority and school level. Similarly, the historical and cultural experiences of CPTs leads them, consciously or unconsciously, to understand and enact education policy at the school level. It may be that the relationship between education policy writers and teachers as policy actors is perhaps more fine-tuned and ingrained in the culture of assessment, improvement and accountability in Scottish education than previously understood, and may benefit from further exploration.

While the position of the CPT in Scottish Education policy may not be immediately obvious in the policy text, through the analysis carried out by this research it has been possible to reveal how the CPT is embedded within the NIF policy. This has been illustrated by identifying common components which display a commonality to both the NIF policy and CPT 2ndGEN CHAT activity systems represented in Table 8.1. These common components have been

explored and defined as mediating actions used to transform the objects of each CHAT activity system and represented as the shared outcome of closing the attainment gap.

Differing objects distinguish one CHAT activity system from another (Foot 2014), which results in a variety of mediated actions across the different activity systems. The mediated actions of the NIF Policy and the CPT represents a commonality in areas such as tools, division of labour and community. This demonstrates the relationship that exists between the NIF policy and where the CPT is positioned in education policy.

CHAT Components	NIF Mediated Actions	CPT Mediated Actions
Object	Driving Improvement	Continuous Improvement
Outcome	Achieving Excellent & Equity	Number of SQA passes
Subject	Teacher and Practitioner Professionali	Empowered Teachers Teacher Observations/PRD
Tools	Finance/Performance Data	Departmental Finance/Pupil Performance Data
Division of Labour	Teacher and practitioner professionalism	Teacher professionalism
Rules	Local Council Improvement Plan	Departmental Improvement Plan
Community	Teachers/Pupils/Parents and Carers/Local Government	Teachers/Pupils/Parents and Carers/Local Government

Table 8.1 The CPT positioned within the NIF policy

8.5 Chapter 8 Summary

This chapter presents a 3rdGEN activity system which demonstrates where the CPT is positioned in the NIF education policy and, through CHAT analysis, provides a theoretical understanding of the practices of the CPT in the middle leadership role. This theoretical exploration was in response to the call from the educational research community (De Nobile 2018, Harris et al 2019) and as such contributes to the body of middle leadership knowledge.

This chapter illustrates the relationship between policy and the policy actors in the pursuit of a common goal and traces the path of education policy from national government to the classroom. How this process occurs is described through an exploration of the cultural and the historical nature of a Scottish education system influenced by the need for global improvement and defined by a focus on raising attainment in order to close the poverty-related attainment gap. In addition, an exploration of power within the 3rd GEN activity system provided an insight into how the mediated actions of the CPT result in the practices they use in an effort to achieve the NIF education policy object of raising attainment.

Chapter 9 Conclusions

9.1 Chapter 9 Introduction

This study aimed to answer the call from previous researchers for a more theoretically informed approach to understanding middle leadership in schools. Using CHAT as the theoretical framework, this research explored the practices of the Curricular Principal Teacher (CPT) in the Scottish Secondary school. The CPT is responsible for managing and leading the curricular department in driving school improvement and enacting the Scottish education policy of raising pupil attainment; a policy seen by the Scottish Government as the answer to closing the poverty-related attainment gap. The context of the CPT in enacting education policy resulted in an exploration of how and where the CPT was positioned in Scottish Education policy in the form of the NIF policy.

Through critical policy analysis, an online survey and semi-structured interview findings were presented in the form of two separate 2ndGEN CHAT Activity Systems representing both the NIF policy and the practices used by the CPT to raise attainment. These CHAT activity systems were then combined and presented as a 3rdGEN networked CHAT Activity system which collectively revealed the position of the CPT in Scottish education policy and explained the influence of education policy on the practices of the CPT in raising attainment.

This chapter summarises the key findings that emerged from the research questions. Potential implications of the study and the contribution to the field of education leadership are discussed. Limitations of the study and potential debates are also addressed. Recommendations based on the key findings are offered as well as a contemplation of how this doctoral research process has influenced me as a currently serving Curricular Principal Teacher (CPT) and as a scholarly professional.

9.2 Study Summary

The aim of this study was to contribute to the knowledge base about middle leadership in schools. Education researchers such as Brown et al (2000), Gurr & Drysdale (2013) and Forde et al (2018) recognised the changed role of the school middle leader from an administrator in the 1990s to the leadership role of today, the lack of understanding of the role performed by the middle leader in schools, and the apparent lack of training and confidence in those currently performing a middle leadership role. Similarly, De Nobile & Ridden (2014), De Nobile (2021) and Harris et al (2019) recognised the lack of theoretical understanding of the role performed by middle leaders in an age when school middle leadership has been transformed (since the 2000s) to include a crucial leadership function in addition to the still essential managerial/administrative role.

It became apparent that in order to achieve a more theoretical understanding of middle leadership in Scottish schools, an exploration of how the CPT was positioned in Scottish education policy would set the context for understanding how the practices of the CPT as a policy actor were influenced by education policy. While it is acknowledged that individuals can proactively influence policy enactment, this study focusses on how the practices of the CPT were influenced by the NIF policy in attempting to raise attainment.

Two research questions were addressed:

1. Where and how is the CPT *positioned* in Scottish education policy?
2. How can CHAT analysis *explain* the *influence* of the policy of raising attainment on the *practices* of the CPT?

The research explored how CPTs made choices and constructed meaning within a constructivist paradigm which was appropriate in interpreting the social world of the CPT (Crotty 1998). A relativist ontology supported how CPTs might interpret their choices differently within their own realities (Hammersley 2013) (RQ1). Critical Policy Analysis allowed for a critique of the NIF policy and how the policy had developed overtime (Young & Diem 2017) (RQ1). The use of CHAT

analysis provided the opportunity to explore a range of factors (Nussbaumer 2017) influencing the NIF policy and how the NIF policy in turn influenced the practices of CPT. CHAT analysis also allowed the interconnectedness (Engestrom & Sannino (2020) (RQ2) of the NIF policy and the CPT to be understood, further illustrating the position of the CPT in education policy.

9.3 Key Findings

9.3.1 Research Question 1

Where and how is the CPT *positioned* in Scottish education policy?

The literature review revealed how middle leadership in schools had evolved due to global government education policies focussed on achieving school improvements (MacBeath 2008). This policy shift led to changes to the middle leadership role in schools from that of an administrative function to one with the added dimension of a leadership role tasked with contributing to the school improvement imperative. Improvement is measured through school inspection and league tables and the accountability of middle leadership is shared with senior school leadership (Reezgit & Creemers 1995).

In the Scottish context, the accountability demanded by government and the strive for improvement was evident in the NIF policy which, in an effort to reduce the poverty-related attainment gap, identified raising the academic attainment of young people as a solution to the persistent social ails of poverty in Scotland (Mowat 2017, Scottish Government 2020).

How the NIF policy had changed since its inception in 2016 to the 2022 version illustrates how the Scottish Government subtly changed the priority of their objectives and adding new priorities while remaining under the banner of the same NIF policy through the introduction, such as through the removal of ‘excellence’ from the 2022 policy and the addition of ‘childcare’ as a new priority. It could be argued that this may serve to give continuity to an already established policy but could also provide a means to hide in plain sight (Agger

1991) policy changes that could potentially go unnoticed by the teaching profession and an unwitting electorate.

The NIF policy outlines the requirement for schools to close the poverty-related attainment gap through raising attainment, the success of which is measured by gathering a range of data (Priestly 2015) from pupil test results to externally produced national exam data. What became clear was how the power to achieve this policy objective was delegated within the Scottish education system, loosely described in NIF policy text as being through local government, schools, and teacher and practitioner professionalism (Scottish Government 2022). This delegation was subsequently manifested in the improvement plans of local governments, schools and departments.

This research shows that the CPT is *positioned* in the NIF policy by policy makers using generic definitions of 'teachers' and 'practitioner professionalism' within the policy text (Scottish Government 2022). While the CPT was not explicitly identified within the NIF policy, critical analysis of the policy text in 2016 and 2002 and the use of the CHAT theoretical framework revealed the CPT to be embedded within the NIF policy. This was revealed through the historical expectation of policy writers of a level teacher professionalism, as defined and governed by the GTCS through a range of standards teachers in Scotland from the beginning teacher to school headship, with the proficiency to enact policy objectives.

In defining the policy expectations of how raising attainment was enacted, the CPT was identified as occupying a crucial role in the NIF policy within the areas of curriculum and assessment, data gathering, and ensuring the development of both their own professionalism and that of their departmental teachers. However, evidence of conflict for CPTs was present in decisions such as allocating experienced staff to ensure maximum attainment while providing opportunities for the professional development of inexperienced teachers.

Where the CPT is *positioned* in Scottish Education policy was identified from the NIF policy expectation of teacher professionalism governed by the GTCS and, in

the case of the CPT, teacher professionalism defined through the Standards for Middle Leadership (GTCS 2021a). Within these GTCS standards, the responsibility for curriculum and assessment, reflected within the NIF policy, provided further evidence of the embedded nature of the CPT within education policy, evident in the necessity for gathering internal pupil performance data, analysing external national qualification data, and managing curricular areas.

Where the CPT is *positioned* in education policy was apparent within the CHAT 3rd GEN activity. This demonstrated a clear relationship between both the 2ndGEN activities (Engestrom & Sannini 2021). Common elements from both the NIF policy and the CPT 2ndGEN Activity systems revealed how the NIF policy text had a direct influence on the practices of the CPT in raising attainment.

This research also demonstrated the historical and cultural influences evident in policy making. This research revealed how policy makers relied on a long-established historical knowledge that assumes the Scottish education system, of which the CPT is a crucial part, is robust enough to enact education policy objectives through a reliance on teacher professionalism.

Policy makers have created within the NIF policy a culture of accountability (Kintrea 2020) and an improvement imperative, both of which influenced the practices of the CPT in raising attainment. The CPT must operate within the Scottish education system to develop strategies which will enact policy objectives through departmental improvement plans which have in turn been influenced by school improvement plan objectives. The CPT uses historical performance data both generated internally and from external data sources such as INSIGHT, as discussed in Chapter 2, in order to reflect on their practices and those of their departmental colleagues which, given the tension created by the spectre of accountability attached to academic performance, may require the development of new practices or the revision of existing practices which acknowledge the improvement imperative.

In exploring the position of the CPT in education policy, this research has shown that CPTs in the study were aware of the differing roles of management and

leadership as defined in the GTCS Standards for Middle Leadership. This was evident in the interview phase when participants expressed confidence in recognising both their managerial and leadership roles. This supports the conclusions of previous research of the dual roles of management and leadership in school middle leadership (De Nobile 2018, Gurr 2018).

This research also demonstrated how the CPTs recognised the GTCS Standards for Middle leadership definitions of management and leadership and were able to relate these definitions to their own current practices. This provided further evidence of the position of the CPT in education policy. It revealed that the CPTs were aware of their own position within Scottish education policy through the requirement in satisfying the standards required for teacher professionalism governed by the GTCS.

In terms of the management and leadership roles, the findings demonstrated that the CPTs had more confidence in their management role within their schools than their leadership role. CPTs in their interviews described management tasks similar to those recognised and defined in previous research as predominantly a list of administrative tasks (Forde et al 2016). The tasks involved in the management role, such as resource allocation, found CPTs to be over 90% confident. However, there was pressure here in allocating the limited resources available. CPTs in their interviews were driven by the clear historical structure within schools, which requires adherence to well established curricula and SQA external exam timetable constraints. This again created pressures for CPTs in ensuring the completion of courses and associated administrative tasks within set timescales (SQA 2023).

In exploring the leadership role, this research found that leadership was firmly embedded in secondary schools. CPTs were found to be confident in some areas of their leadership practices and less so in others. CPTs in the study were more confident when leadership activities were internal to the school, such as leading school improvement objectives, ethos, and in their relationships with motivating and developing their teachers. However, motivating staff caused tensions for CPTs in balancing the motivational needs of staff and ensuring maximum

performance of pupils. This confidence demonstrated a shift away from the purely administrative role or an unwillingness to take on the leadership responsibilities as concluded by Bennett (2003) and later still by Bennett et al (2007).

The CPTs in the study appeared to lack confidence in other aspects of their leadership role. This research found that the CPTs lacked confidence particularly in the newly introduced aspects of the GTCS standards in 2021. Confidence dropped to 60% for example when engaging with policy and research or promoting a culture of professional learning. This supports the view of Gurr & Drysdale (2013) who recognised the underdevelopment of professional knowledge in middle leadership. This may be as a result of the rather informal nature of the introduction of the refreshed GTCS Standards for Middle Leadership in 2021 rather than any formalised professional imperative for middle leaders to engage with the middle leadership standards, or perhaps a lack of career development opportunities.

9.3.2 Research Question 2

How can CHAT analysis *explain* the *influence* of the policy of raising attainment on the *practices* of the CPT?

The use of a CHAT theoretical framework explains the influence of policy on the practices of the CPT in the effort to raise attainment and, more specifically, the influence of the NIF policy.

The NIF policy changed in terms of some of its political priorities from 2016 to 2022, revealed in this research through amendments identified in the policy texts. CPTs as policy actors are subject to 'policy discourses' (Ball et al 2011, p. 625), therefore amendments to the NIF policy inevitably influenced the practices of the CPTs who then have to re-evaluate how CHAT elements are managed and led, such as through a change to the rules which impact improvement plans, or changes to the tools in terms of budget allocations.

Rather than a list of tasks pertaining to the middle leadership role (Forde et al 2016), the findings demonstrate how the practices of the CPT were embedded in

the cultural and historical background of the Scottish education system and revealed the clear understanding of CPTs in their role in raising attainment and in the practices they performed in their efforts to do so. During the interview process, CPTs were able to articulate their understanding of the Scottish education system and their place within it. In doing so they described practices in which they made decisions, such as allocating their teachers for the maximum benefit of pupils, managing resources, operating with deadlines and reflecting on performance data.

CHAT Analysis revealed the practices of the CPT as human activities within the complex school environment (Berg et al 2016) focussed on raising attainment within their departments. As a 2ndGEN activity system, the CHAT elements revealed the complex nature of the processes undertaken by CPTs which helped shape their practices influenced by policy.

The CHAT theoretical framework demonstrates how separate actions can be interwoven to create a single activity (Postholm 2014). The creation of a single 3rdGEN CHAT activity system presented the practices of the CPT and the NIF policy as a single activity in the form of the 3rdGEN CHAT shared object of closing the attainment gap.

This research successfully applied the theoretical framework of CHAT to present an understanding of the practices associated with the middle leadership role of the CPT in the Scottish secondary school. This theoretical framework builds on other models of middle leadership (Gurr & Drysdale 2013, De Nobile 2018) and recognising the complexities of the middle leadership role (Gurr 2018). The interviews conducted with CPTs revealed the influence of raising attainment policy on the complex range of practices carried out by CPTs as middle leaders and contextualised these as the elements of a CHAT activity. This analysis was able to reject the view of middle leadership as simply carrying out a list of tasks (Forde et al 2018).

This research answers the call for a more theoretical approach to middle leadership and presents the middle leader as far more than that of an

administrator carrying out administrative tasks or as 'a conduit for mandated policy' (Forde et al 2018, p. 22). Rather, this theoretical perspective on middle leadership, in the Scottish context, reveals a middle leader who occupies a complex and crucial position within schools, situated between the classroom teacher and senior leadership (De Nobile 2018), and *positioned* within the complexity of the politically driven education system in Scotland.

In understanding the CPTs as the 'policy actors' described by Ball et al (2011), the interview process revealed middle leaders who were confident in enacting education policy, in the case of this research, in attempting to raise attainment. CPTs were clear on their position and purpose within their schools. CPTs demonstrated clear strategic practices in leading their departments to raise attainment within the parameters of a school improvement plan, which included significant aspects of the NIF policy.

These findings contrast with the views of Ball et al (2011, p. 637), who described policy enactment, in English schools specifically, as 'incoherent' and nothing more than a configuration and reconfiguration of policy, while cautioning researchers against analysing away this glaring issue. Annually, schools and departments produce improvement plans consisting of action points which succinctly detail how policy will be enacted. While policy actions may be reviewed throughout an academic year, the sense that middle leaders are attempting to enact policy within sites of the chaotic and instability caused by numerous policy changes (Ball et al 2011) did not appear to be evident within the context of this study. This could be explained by policy changes that appear to move at a slower pace than Ball et al (2011) suggest, given the slow rate of policy change in the NIF policy from 2016 to 2022 as explored in Chapter 5.

9.4 Limitations of the study

There are some potential limitations of the study which should be considered when interpreting the results of this research.

As a serving CPT, there is the potential for researcher bias, particularly when interpreting the responses from the online survey and participant interviews. The potential for researcher bias can include the opinions and attitudes of the interviewer as well as seeking answers which support the research (Cohen et al 2018). Particularly, at the interview stage, there was the overall perception by the participants. They knew I was a practicing CPT and that I would understand the points they were making and interpret these effectively. This presented an issue in how I interpreted the responses of participants. However, I was careful during the interview process to 'self-appraise' my role (Cohen et al 2018) and not to offer any kind acknowledgement to responses, ensuring that I positioned myself as the researcher unencumbered by the issues discussed by participants. Ultimately, given that this was an EdD thesis about Education Leadership, it is necessary to recognise that this research was undertaken by an EdD student who is also a practicing middle leader.

The semi-structured interviews were conducted using an opportunistic sample of 12 CPTs drawn from both the email addresses included by some participants from the online survey and from CPTs known to me who were contacted through email and invited to take part. While a range of curricular areas and differing degrees of service were evident, the small sample cannot allow the results to be generalisable, although it was not the aim of this study to be so.

Coding of data can result in the perspective of the participant's world to be reflected in the codes but subsequently interpreted differently by the researcher (Bryman 2012). This could mean that my interpretation of the coded data was influenced by my lived experience as a serving CPT, in addition to potential bias in identifying data which would better support the research questions. The codes used were robust in that they were directly related to the elements of a CHAT activity and the GTCS Standards for Middle Leadership and formulated using a data structure model (Gioia 2012). In addition, quotations from the semi-structured interviews were used to illustrate the lived experiences and world perspectives of the participants.

This research focused specifically on the practices of the CPT in relation to the NIF policy objective of raising attainment. It must be acknowledged that the role of the CPT was defined in this research in terms of management and leadership as defined in policy. There are other factors which can influence the practices of the CPT such as the effectiveness of the school senior leadership team, the catchment area of the school or calibre of the teaching staff within the department. Other factors can impact on the practices of the CPTs and were not addressed specifically in either the survey or semi-structured interviews, although participants were given the opportunity to express any other issues they felt were relevant in the last question of the interview process.

This research was limited in focussing solely on the middle leadership position of the curricular leader in the secondary school. In the Scottish education system, there is a range of middle leadership roles in both primary schools and secondary schools (Forde et al 2019) such as Support for Learning and Pupil Support teachers. The nature of these middle leadership roles could reveal different experiences of the GTCS Standards for Middle Leadership and the NIF policy of raising attainment.

While this research has presented a theoretical exploration of NIF policy enactment and the practices of the CPTs in raising attainment, it must be acknowledged that this research did not explore the perceived failure of the Scottish Government's raising attainment policy to close the attainment gap (Scottish Government 2019). This research therefore does not explain if the practices of the CPT have had any impact on the failure of the NIF policy to close the attainment gap.

9.5 Recommendations

9.5.1 Middle Leadership and the GTCS Standard for Middle Leadership

Given the recent changes to the GTCS Standards for Middle Leadership in 2021, CPTs were not confident in their understanding of these new changes to the standards, particularly in areas which related to political insight and power.

While there remains little evidence of the impact of the GTCS Standards (Coutney 2018), the GTCS and the Scottish Government continue to rely on teacher professionalism, described as 'teacher and practitioner professionalism' in the NIF policy (Scottish Government 2021), in order to enact policy. Given the importance placed on teacher professionalism, there is a necessity to **formalise engagement with the professional standards to ensure teacher confidence in understanding the expectations detailed within the standards. Changes to the GTCS standards could also be better communicated to teachers as members of the GTCS. Unfamiliarity with the changes may explain the lack of confidence in the new additions to the policy in 2021.**

While a voluntary middle leadership course is available to aspiring middle leaders (Aspiring to Middle leadership 2023), interestingly based on the roles defined by De Nobile (2021), the crucial position of middle leadership in schools (Li et al 2018) is not formalised. In order to position the middle leadership role more formally between the qualifications required to enter the teaching profession and the master's level qualification required to progress to Headship in Scottish schools, a **formal middle leadership qualification could usefully be considered, endorsed by the GTCS for teachers considering a middle leadership post.** (*Sections 6.8, 6.9*).

9.5.2 The Middle Leadership role in Scottish Education Policy

This research successfully demonstrated the position of the CPT in their middle leadership role embedded in Scottish Education policy within a network of interacting activities and well-established roles (Spinuzzi 2019). However, this vital role is not recognised in education policy texts but embedded within the generic definitions of 'teacher' or 'teacher professionalism' in both the 2016 and 2022 version of the NIF policy. **The role of the middle leader in enacting education policy could be more clearly acknowledged in policy text with a clear indication of the expectations placed on middle leadership** (*Sections 5.8, 7.6, 7.9, 8.2, 8.3, 8.4)***.**

9.5.3 Research into Education Middle Leadership

This research has demonstrated the benefits of a theoretically informed approach to investigating middle leadership explored within the different policy contexts (Leithwood 2016) of national education policy, the school and the curricular department. The theoretical CHAT framework of the middle leader **could be used by researchers as a means to explore further the effectiveness of the social networks which exist within a range of education policy contexts such as the school/local authority/community social network** *(Sections 7.6, 7.8, 8.4)*.

Previous middle leadership research has tended to focus on roles and responsibilities associated with leading school objectives (Forde et al 2018). Research which focusses more on the practices of middle leadership (Grootenboer 2018) and which takes a more theoretical approach has been called for (De Nobile 2018, Harris et al 2019). **The CHAT theoretical framework could be considered by other researchers to aid the theoretical exploration of middle leadership. This exploration could potentially be considered in conjunction with other practice theories** *(Sections 2.3, 2.12)*.

9.5.4 Summary of Recommendations

- Formalise engagement with the professional standards.
- Changes to the GTCS standards communicated more effectively to teachers.
- Creation of a formal middle leadership qualification endorsed by the GTCS for teachers considering a middle leadership post.
- The role of the middle leader to be more clearly acknowledged in policy text with a clear indication of the expectations placed on middle leadership.
- The use of CHAT framework as a means to explore further the effectiveness of the social networks which exist within a range of education policy contexts such as the school/local authority/community social network.
- The CHAT theoretical framework to further aid the theoretical exploration of middle leadership.

9.6 Contribution to knowledge

This research has made three main contributions to knowledge.

A critical policy analysis contrasting the 2016 version of the NIF policy and its later 2022 version, for the first time, revealed subtle policy changes and revisions and the emphasis placed on policy objectives over time. The NIF policy was also represented for the first time as a theoretical framework of interconnecting elements using CHAT to represent how the NIF policy attempted to achieve its object leading to the desired outcome (Nussbaumer 2012).

The CPT, representing middle leadership in the context of the Scottish education system, was explored for the first time by identifying how and where this middle leadership role is positioned in education policy. In addition, the CHAT theoretical framework used in this research explored the practices of the CPT, answering the call for a more theoretical approach to researching the role of middle leadership (De Nobile 2018, Harris et al 2019).

Finally, the use the CHAT theoretical framework demonstrated, for the first time, how education policy and the middle leadership practices of the CPT were intertwined and engaged in reaching the same overall policy outcome.

9.7 Professional Reflections

While reflecting on completing the EdD process, Murray (2011, p. 284) ponders 'Was it really worth it?'. She argues that there is no guarantee of promotion, more money or full-time employment. Fortunately, Murray (2011) argues that the answer is yes, in that other than having a new qualification and developing new skills, further benefits of the EdD may be revealed over time. At this juncture, I am able to discuss a number of the immediate benefits I see in completing the EdD, while expressing my hopes of further benefits in the future.

As a teacher of 27 years, 22 as a CPT, I have been responsible for the education of a great many hundreds of pupils, many within my own classroom, and have

worked with a large number of teachers, all through a variety of ever-changing education policy initiatives. One thing I have learned is that a teacher, regardless of their promotion level, is never the finished article. There is always more to know, better ways to work, and new attitudes to adopt. This has been the philosophy which led me from a master's degree in Education Leadership to continue to grow and expand my experience both personally and professionally as an educator beyond the confines of the school gates.

The EdD benefits mostly the individual (Kumar & Dawson 2013) and I do believe there is an element of truth to this. Undertaking the EdD has undoubtedly changed my ability to write at the highest academic level, to synthesise the work of others and to undertake my own research. What I have also noticed is that in listening to some school issues, they can now seem somehow quite trivial in some ways and I feel I may have outgrown the school environment! This has further had the effect of instilling in me a confidence to both challenge school policy and also offer an alternative viewpoint.

I would argue against the view of Kuman & Dawson (2013) in that it is impossible not to share the benefits of an EdD with other teaching professionals, be this through professional conversations or by contributing to professional development. I have now found myself contributing to both, with colleagues not only impressed by my commitment to the EdD study, but also genuinely interested in my research and its potential implications.

Through the EdD process, I have also developed transferable skills and expertise (Halse & Mowbray 2011). I have developed the confidence to deliver professional development opportunities to aspiring middle leaders not only by sharing my own practical experience but also by sharing an understanding of education policy grounded in research and its implications for schools, much of which has evolved through the reading required at EdD level.

In year 1 of the EdD, it became apparent that undertaking research in the area of middle leadership would be of benefit in two ways. First, it was a subject area I would want to live with for the next few years, and second, I may be able to

contribute to the body of middle leadership knowledge which, as a currently serving CPT, may give a measure of credibility over research that had originated within the confines of a university.

In describing the purpose of the EdD, Kumar & Dawson (2013) highlight the application of theory and research to problems identified in practice. In undertaking research into middle leadership, I developed a new perspective on the importance of the middle leadership role in the Scottish education system, which I believe to be integral to the enactment of government policy. I was able to develop the skills to apply a theoretical approach and identify a problem in the lack of recognition of the middle leader at the level of policy making as well as a lack of any formal training for this vital role. These were issues that I had not considered before undertaking the EdD and which have now changed my perspective on the middle leadership role I perform.

The purpose of the EdD is to allow professionals the opportunity to develop research, which is relevant to an area of professional practice rather than in producing the professional researcher through a PhD programme (Morley & Petty 2010). In this context, at the start of the EdD process I would not have believed I could develop the originality required to be able to add to the body of middle leadership knowledge. Morley & Petty (2010, p.187) describe 'the stance of professional artistry' which develops from the researcher's ability to generate knowledge from practice. In developing knowledge, I realise I have been able to explore the practices of the CPT and have developed the professional artistry to achieve this.

Finally, over the last four years, being able to engage with academic professionals and fellow students at the University of Strathclyde, particularly my supervisors, has been invaluable in my professional development as a researcher. The opportunity to discuss and be challenged on my thinking, writing and research has been a crucial part in elevating me from a master's graduate to a doctoral-level professional.

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Appendix 1 – Online Survey

Participant Information Sheet

. Please read the Participant Information Sheet before reading the consent form and agreeing to take part in the survey.

Participant Information Sheet for Curricular Principal Teachers Name of department: Education Title of the study: Raising attainment in the Scottish secondary school: A theoretical exploration of how the policy of raising attainment influences the practice of the Curricular Principal Teacher.

Introduction

My name is Val Martin and I am Faculty Head of Business and Computing Science at Williamwood High School and a postgraduate student of the University of Strathclyde undertaking the EdD in Education Leadership. I can be contacted by email at valerie.martin@strath.ac.uk or martinV1@williamwood.e-renfrew.sch.uk

What is the purpose of this research?

The purpose of this research is to explore how the Scottish education policy of raising attainment influences the practice of the Curricular Principal Teacher in Scottish Secondary schools.

Do you have to take part?

Participation is completely voluntary. You will have adequate opportunity to withdraw which will in no way affect the study.

What will you do in the project?

You will be asked to complete an online questionnaire based on the GTCS Standards for Middle Leadership and Self-Evaluation Wheel. You may then be selected take part in a further interview to explore your role as a Curricular Middle Leader in raising attainment. This will focus specifically on academic achievement in the senior phase.

Why have you been invited to take part?

For the questionnaire, curricular middle leaders have been selected to investigate how the GTCS Standards for Middle Leadership compares to the real life experiences of Curricular Middle Leaders. Curricular Principal Teachers of Business and Computing Education have been selected for the interview part of the study as this means that the responses from participants can be compared from one particular curricular area.

What information is being collected in the project?

Questionnaire The questionnaire will be conducted on line and will not include any personal information other than to identify you and your school, however this will be anonymous at the data analysis stage. You will be asked 18 questions relating to your position as a middle leader which will form the data being collected. The survey takes 10 minutes to complete.

Who will have access to the information?

Access to data will only be available to the research team.

Where will the information be stored and how long will it be kept for?

All collected information from the questionnaires and interviews will be stored electronically in secure, password-protected folders. At a suitable time after the completion of the research, normally one year, all the data files will be destroyed.

Thank you for reading this information – please ask any questions if you are unsure about what is written here. All personal data will be processed in accordance with data protection legislation.

Please read our Privacy Notice for Research Participants for more information about your rights under the legislation.

What happens next? If you are happy to take part in the questionnaire, please follow the link below to read the consent from and take part in the survey. The questionnaire will take around 10 minutes to complete.

You will be asked to sign a consent form to confirm you are happy to take part in the research. If you have decided not to take part, thank you for taking the time to read the information sheet.

A summary of the findings of the investigation will be made available via email and a copy of the completed thesis on request.

You can request that your information is not included in the research by: 31st August 2022.

Researcher contact details:

Val Martin
School of Education University of Strathclyde Valerie.martin@strath.ac.uk

Chief Investigator details:

Professor Aileen Kennedy School of Education University of Strathclyde
Telephone: 0141 444 8061
E-mail Aileen.Kennedy@strath.ac.uk

This research was granted ethical approval by the University of Strathclyde Ethics Committee. If you have any questions/concerns, during or after the research, or wish to contact an independent person to whom any questions may be directed or further information may be sought from, please contact: Secretary to the University Ethics Committee Research & Knowledge Exchange Services University of Strathclyde Graham Hills Building 50 George Street Glasgow G1 1QE Telephone: 0141 548 3707 Email: ethics@strath.ac.uk

Consent Form

Please read the consent information below and check the consent option below if you are happy to take part in the investigation.

I confirm that I have read and understood the Participant Information Sheet for the above investigation and the researcher has answered any queries to my satisfaction. I confirm that I have read and understood the Privacy Notice for Participants in Research Projects and understand how my personal information will be used and what will happen to it (i.e. how it will be stored and for how long). I understand that my participation is voluntary and that I am free to withdraw from the project at any time, up to the 31st August 2022, without having to give a reason and without any consequences. I understand that names and places of work will be anonymised. I understand that I can request the withdrawal from the study of some personal information and that whenever possible researchers will comply with my request.

I understand that anonymised data (i.e. data that do not identify me personally) cannot be withdrawn once they have been included in the study. I understand that any information recorded in the research will remain confidential and no information that identifies me will be made publicly available. I consent to being a participant in the investigation. I consent to being audio and/or video recorded as part of the project

. Please make a selection below to take part in the investigation.

- ◯ I consent to taking part in this investigation
- ◯ I do not consent to taking part in this investigation

. Please read the GTCS Standards for Middle Leadership below and evaluate yourself in terms of how confident you feel that you are achieving each standard.

Q1. Promote, model and support the professional values and professional commitment.

Really not confident/unfamiliar with this/ lots of areas to work on.										Feel very confident/ accomplished in this area.
0	1	2	3	4	5	6	7	8	9	10
◯	◯	◯	◯	◯	◯	◯	◯	◯	◯	◯

Q2. Have knowledge and understanding of Leadership and Management and how to develop and demonstrate strategic vision.

Really not confident/unfamiliar with this/ lots of areas to work on.										Feel very confident/ accomplished in this area.
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q3. Understand and develop self awareness, political insight and interpersonal skills and abilities.

Really not confident/unfamiliar with this/ lots of areas to work on.										Feel very confident/ accomplished in this area.
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q4. Have enhanced and critically informed understanding of Curriculum (in developing content, pedagogy, assessment and provision.

Really not confident/unfamiliar with this/ lots of areas to work on.										Feel very confident/ accomplished in this area.
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q5. Help promote the learning context and culture of wellbeing for all, through positive purposeful relationships and partnerships to meet the needs of all learners.

Really not confident/unfamiliar with this/ lots of areas to work on.										Feel very confident/ accomplished in this area.
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q6. Critically engage with policy, research and practice to model, lead and promote a collaborative culture of professional learning.

Really not confident/unfamiliar with this/ lots of areas to work on.										Feel very confident/ accomplished in this area.
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q7. Contribute to and sustain a culture of self-evaluation for improvement to evaluate the impact on every learner.

Really not confident/unfamiliar with this/ lots of areas to work on.										Feel very confident/ accomplished in this area.
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q8. Manage resources in a fair, transparent and equitable way.

Really not confident/unfamiliar with this/ lots of areas to work on.										Feel very confident/ accomplished in this area.
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q9. As a Middle Leader, you contribute to the shared strategic vision, ethos and aims of the school.

Strongly Disagree										Strongly Agree
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q10. As a Middle Leader, you have an insight and understanding of the dynamics of political power and influence in the relationship between schools and society in general and the local community and context.

Strongly Disagree										Strongly Agree
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q11. As a Middle Leader, you understand the impact and implications of political insight for your leadership and management practices and the work of school and learning community.

Strungly Disagree										Strongly Agree
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q12. As a Middle Leader, you facilitate a culture which promotes and sustains high-quality curriculum practices (including pedagogy and assessment).

Strongly Disagree										Strongly Agree
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q13. As a Middle Leader, you agree, develop and establish processes to validate and enhance the quality of curriculum practices (including pedagogy and assessment).

Strongly Disagree										Strongly Agree
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q14. As a Middle Leader, you ensure resourcing decisions are taken in fair, transparent and equitable ways taking taking account of identified priorities.

Stongly Disagree										Strongly Agree
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Q15. Is there any aspect of your role as curricular principal teacher that you feel is important but is not included in the above questions?

Email Address

Email. If you are a Curricular Principal Teacher of Business and Computing plus (any other subject) and would be willing to take part in a follow up interview, please enter a valid email address.

Appendix 2 Survey Invitations

Sample Survey invitation Tweet

Calling all Scottish Secondary Curricular Principal Teachers! I would be most grateful if you could complete a short survey for my EdD thesis investigating the important role of middle leaders. The survey is based on the GTC standards for Middle Leadership. Please follow the link here and please pass onto colleagues.

Sample Email to colleagues

Dear

I am now in year 3 of the EdD in Education Leadership, looking at the role played by curricular principal teachers in raising attainment. In order to find out the views and experiences of middle leaders in this role I would be grateful if you could complete a short survey of questions by following the link below. From these responses I hope to contact a small number of PTs for a more in-depth interview.

Your participation would be most appreciated. If you require any further information please do not hesitate to contact me.

Link:

Best wishes

Val

Appendix 3 Participant Discussion Sheet

CPT Interview

Introduction

Thank you for agreeing to being interviewed as part of my research. I am interested in finding out your views on your role as a Curricular Principal Teacher. Some of the questions relate to the survey you completed and some are related to the GTCS Standards for Leadership focussed on how you manage and lead raising academic attainment in your department.

Please find below the questions for discussion. There is no need to prepare anything in advance.

The GTCS defines leadership as "the ability to: develop a vision for change, which leads to improvements in outcomes for learners and is based on shared values and robust evaluation of evidence of current practice and outcomes; and mobilise, enable and support others to develop and follow through on strategies for achieving that change. Do you recognised this definition in terms of how you lead your own department? In developing a vision for change, evaluating change and mobilising others?
GTCS Standards define management as "the operational implementation and maintenance of the practices and systems required to achieve this change". In what ways do you manage the day to day implementation of practices and systems in your own department?

How important is raising attainment as a part of your role as CPT?
Which resources do you consider your role as CPT in leading raising attainment?
In what ways do you ensure that your teachers are effectively engaged in raising the attainment of pupils?
What influence do external bodies have on your strategies for raising attainment? eg SQA, Education Scotland, GTCS Does the school improvement plan influence your approach to raising attainment within your department?
Is there any influence exerted by these groups on your practice in raising attainment? • Departmental Teachers • Parents • Pupils • Senior Management

When considering raising attainment. What influences the decisions do you take in allocating classes to teachers?
How do you measure attainment within your department? How do you know attainment has improved?
Is there anything about your role that is important or challenging that we have not covered?

Appendix 4 Interview Schedule

Interview Schedule

Introduction

Thank you for agreeing to being interviewed as part of my research. I am interested in finding out your views on your role as a Curricular Principal Teacher. Some of the questions relate to the survey you completed and some are related to the GTCS Standards for Leadership focussed on how you manage and lead raising academic attainment in your department.

Firstly, we can go through the participant information sheet and consent for the interview and I can explain how the data will be used.

Participant Name	
Participant No	
Focus Area	**Probes and Question**
Leadership Role	**The GTCS defines leadership as "the ability to: develop a vision for change, which leads to improvements in outcomes for learners and is based on shared values and robust evaluation of evidence of current practice and outcomes; and mobilise, enable and support others to develop and follow through on strategies for achieving that change.** Do you recognised this definition in terms of how you lead your own department in developing a vision for change, evaluating change and mobilising others?
Managerial Role	**GTCS Standards define management as "the operational implementation and maintenance of the practices and systems required to achieve this change".** In what ways do you manage the

	day to day implementation of practices and systems in your own department?
Object	**Compared to other aspects of the role** How important is raising attainment as a part of your role as CPT?
Tools	**Financial, CLPL, commercial resources, agencies, most important resources** Which resources are the most important to you in your role as CPT in leading raising attainment?
Subjects	**CLPL, Quality Assurance** In what ways do you ensure that your teachers are effectively engaged in raising the attainment of pupils?
Rules	**SQA, Education Scotland, ERC** What influence do external bodies have on your strategies for raising attainment? How Does the school improvement plan influence your approach to raising attainment?
Community	**Demands, complaints, expectations** What influence, if any, is exerted by these groups on your practice in raising attainment? • Departmental Teachers • Parents • Pupils • Senior Management

Division of Labour	**Timetable, SLT** When considering raising attainment, what influences the decisions you take in allocating classes to teachers?
Outcomes	**Results analysis, SQA results** How do you measure attainment within your department? How do you know if attainment has improved?
Final Question	Is there anything about your role that is important or challenging that we have not covered?

Appendix 5 Nvivo Summary Report Example

02/01/2023 17:24

Coding Summary by Code

CPT Interviews

02/01/2023 17:24

Aggregate	Classification	Coverage	Number Of Coding References	Reference Number	Coded By Initials	Modified On
Code						
Codes\\Leadership						
Document						
Files\\KIM						
No		0.0130	3			
				1	VM	05/11/2022 15:49
and we're talking about vision						
				2	VM	05/11/2022 15:50
I think for me it's about I'm not forcing people to change						
Files\\JAMES						
No		0.0429	11			
				1	VM	18/10/2022 11:08
the development of vision						
				2	VM	18/10/2022 11:08
shared values						
				3	VM	18/10/2022 11:09
changing those values and then robust evaluation.						
				4	VM	18/10/2022 11:10
You have to have the vision and the first place.						
				5	VM	18/10/2022 11:15
I think the first thing I would do is maybe goes back to that leadership role.						

Aggregate	Classification	Coverage	Number Of Coding References	Reference Number	Coded By Initials	Modified On
				6	VM	18/10/2022 11:16

shared values and attainment.

				7	VM	18/10/2022 11:17

The things you need to do to get them all on board

				8	VM	18/10/2022 11:17

share values you need to make sure the staff understand how to access attainment.

				9	VM	18/10/2022 11:27

Based on their motivation as well, if they are feeling like they don't want to do anything. Then it, it can be pretty tough job really to get them to raise attainment.

				10	VM	18/10/2022 11:32

I think that you're a middle manager right so you've got kind of pressure from above like your senior management team and then you've got your own staff and it's trying to you're almost feel like you're that you're man in the middle. For want of a better kind of phrase, You know, I mean, you're kind of you're trying to get the wants and the values of the school across but the same point managing and leading your own staff to do that. A huge role of what we do is really relationships isn't it communication.

				11	VM	18/10/2022 11:32

Building that up with your staff because if you don't have that you're not going to get anywhere with any of this.

Files\\ANGELA

No		0.0200	3

				1	VM	05/11/2022 16:00

That's kind of what our jobs all about, isn't it?

				2	VM	05/11/2022 16:01

I think so. And I think it's about you're always like adapting and you're always changing. So you're always gathering your evidence. You're always then speaking to people, and then you're taking the next step forward, as I would say, that's probably describes our job quite well, to be honest with you.

				3	VM	05/11/2022 16:06

I mean I was really disappointing my higher results and I'm saying like let's think about different things and people are giving ideas and we've got another be good intentions. But what's that teamwork?

Files\\JAIME

No		0.0796	8

				1	VM	13/11/2022 16:43

Yeah, I actually do. Yes. I think for me coming into this post fairly recently, a big part of it was creating a culture where we could share a vision and share a share. A common goal as a department.

				2	VM	13/11/2022 16:43

And it helped me in establishing the vision that I wanted to create because I thought I want to create a vision that is based on the people that I know are there.