University of Strathclyde

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A study of policy change and stress amongst teachers in Scottish schools

by

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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 which has led to the award of a degree.

Signed   Date

_____   27th November 2012

Dedication

This thesis is dedicated to my siblings Anne, Tom and John.

Acknowledgements

I would like to acknowledge and thank the people who have ensured the completion of this thesis.

Above all, I am very grateful to the teachers in the schools who took the time to respond to my requests. Without them, there would have been no thesis.

Although it has taken more time to complete than I had anticipated, each supervisor has contributed to my understanding of the research process in different ways. Most recently, I have been very fortunate indeed in having the guidance of Professor James McNally, who gave me confidence and encouraged me to the end of the process.

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Table of Contents

Abstract

The study explored whether initial impressions of occupational stress observed in teachers were derived from educational changes or factors intrinsic to teaching. It involved 49 teachers in two learning communities in a Scottish inner city location and a further six teachers who were not part of either learning community, but who were studying for a higher degree at a Scottish university. The study began in 2005, in the early years following the implementation of major education reforms by the new Scottish Parliament since 2000. A literature review revealed many examples of occupational stress in teaching, but a paucity of research undertaken specifically in Scottish schools. The mixed-method qualitative approach used a postal questionnaire-survey, adapted from one constructed for the purpose and used by Travers and Cooper. Fifty-six teachers out of a possible 144 responded to the questionnaire. The statistical package for the social sciences (SPSS) was used to analyse the responses to determine the mean stress score and SD of the stressor variables and to determine the level of agreement with statements linked to new policy in the attitude scale. Nine teachers agreed to follow-up group interviews, utilising a thematic framework for analysis of the teachers' accounts. A further question, linked specifically to Curriculum for Excellence (CfE), was sent to the schools via email. The study found that factors related to general workload, policy on inclusion and HMIE were the major stressors. Lack of control, of and in their professional lives, evolved as a major issue for many teachers. Another important finding was that teachers and headteachers thought that pupil attainment had not risen following the initiatives. Teachers showed a positive response to CfE, especially to the autonomy they felt in delivering the curriculum, but workload associated with CfE received negative comments. Workload does appear to be a continuing issue in teaching, still largely unrecognised by government. With the withdrawal of the Chartered Teacher scheme, which was not well supported by teachers, the question of how to reward experienced teachers who wish to remain in the classroom is still unresolved.

Chapter 1   Background

1.1   Introduction

This chapter outlines the background of the study, making reference to the recent changes that have taken place in Scotland, and an overview of the findings from a number of studies on occupational stress in teaching. The chapter also addresses the purpose of the study and its professional relevance as a research enquiry. The context of the study was and still is a climate of continuing policy change taking place within Scottish education at the beginning of the new millennium. The focus of the research is to explore the impact that policy changes in education introduced by the new Scottish Parliament may have had on the workload stress and career choices of teachers in two learning communities in a Scottish city. It is essentially a qualitative mixed method study that uses a semi-structured questionnaire as the primary source of data, followed by interviews with teachers who volunteered to give fuller responses to questions related to sources of pressure.   A further open question was added at a later stage in the study to include teachers' initial impressions of working with *Curriculum for Excellence* (CfE), launched after the study had begun and implemented in full, in session 2010 – 2011.

1.2   Background to the study

The starting point for the study was a growing sense of disjunction between policy and the practice of teachers that seemed to be associated with the introduction of policy initiatives, mainly "*National Priorities in School Education* (SEED, 2000a)" and "*A Teaching Profession for the 21ˢᵗ Century* (SEED, 2001) (The McCrone Agreement). Personal observation and anecdotal impressions as a practising

classroom teacher were strong enough to suggest that an investigation was merited. The idea was reinforced by a preliminary reading of literature, which revealed an association between various sources of occupational stress, including change and workload, and the resulting manifestations of stress (Dunham, 1992; Travers and Cooper, 1993, 1996; Wootton, 2002). The McCrone Agreement, for example, introduced a mandatory 35 hours per annum of Continuing Professional Development (CPD) for all teachers as well as a new post of Charter Teacher (CT). An important question was whether and to what extent such aspects of the McCrone Agreement were strongly affecting the professional lives of teachers in terms of stress.

The following paragraphs present a brief outline of the meaning of policy and the place of power within the policy making process and then continue with a discussion on policy making in education. The main focus has a Scottish perspective and draws largely on the work of Walter Humes, whose influential publications include work on teacher education, educational leadership and management, history of education and policy studies.

1.3 Different perspectives on the definition of policy

The diversity of conceptual issues encompassed by the term "policy" is too wide-ranging to be confined to one, concise definition. Bell and Stevenson (2006) claim that it is important to develop an understanding of policy that represents the breadth and complexity that the reality of policy analysis entails. They posit that one approach to understanding the concept of policy is to think of it as a "*programme of*

action, or set of guidelines that determine how one should proceed given a particular set of circumstances" (p.14). They cite the work of Harman (1984) who distinguishes between policy *"as statements of intent"* and policies *"that represent plans or programmes of work;"* and the work of Blakemore (2003, p.10) who defines policy as "*aims or goals*, or *statements of what ought to happen."* In Harman's and Blakemore's view of policy as a goal–orientated, systematic course of action, the emphasis is on policy as a product or an outcome rather than a process, and as such, it becomes detached from the context, the purpose and the aims of the policy. In contrast to this viewpoint, Kogan (1975), places policy within a context of the wider fundamental questions of what and who is education for, and as such sets values at the centre of understanding policy.

Kogan (1975) identified three key values that underpin and inform educational policy – educational, social and economic - values that he asserts are basic "*self-justificatory oughts,*" and a fourth value, institutional, which he considers a secondary value, "*concepts that carry the argument into the zone of consequences and instruments and institutions*" (Kogan, 1975, p.54). Kogan's study took place during a period when there was cross-party agreement and commitment generally to the expansion of educational provision. Bell and Stevenson (*op.cit.*) claim that studies such as Kogan's regarded the values supporting policy development as unproblematic, since they would be attained through a process of negotiation and compromise. This resulted basically in a linear view of policy development which looks for solutions to given problems, forms strategies and implements them. This type of approach to policy making is sited within a pluralistic theory that sees the

task of the government to be involved in a continuous bargaining process with competing groups. One advantage of this perception of the policy making process at government level is that it can bring to light the internal workings of policy-making bureaucracies and can reveal non-governmental public bodies (NGPB) as influential in the decision making process. Bell and Stevenson (2006) however, argue that the unequal distribution of power among interested parties is often not recognised and that this linear model of policy fails to fully represent the basic elements of the concept of policy, and how policy is both shaped and experienced by those involved at all stages in the policy process, stating that:

> *"Policy emerges from political pressures and is contained within a political system whose purpose is to transform group conflict over public resources and values into authorised courses of action contesting their allocations"*(p.16).

The pluralist emphasis on institutional policy processes tends to support the generation of policy, but has less to say about the implementation of the policy, suggesting that in this event policy then "*gets done*" to people by a chain of implementers.

In contrast, Ball (1994) conceptualises policy as both text and discourse. He argues that focus on policy as text helps highlight the style in which policies are presented and interpreted. Policies may have multiple authors involved in encoding policy in complex ways "*via struggles, compromises, authoritative public interpretation and reinterpretations*" (p.16). On the other hand, de-coding the policy texts by multiple readers ensures a diversity of interpretations by individuals with their own contexts

and values, which Ball claims influences ways in which policy may be interpreted by readers:

> "*The physical text that pops through the school letterbox, or wherever, does not arrive "out of the blue" – it has an interpretational and representational history – and neither does it enter a social and institutional vacuum*" (p.17).

Within the concept of policy as text exists the opportunity for writers and readers in the process to exercise some measure of influence over the development of policy, and also the potential to generate individual and collective power through interaction between differing ideological and social responses to policy. There is a need, nonetheless, to be aware that policy responses are shaped by wider structural factors, powerful enough to restrict the ability of individuals to wield much power over the form of policy (Bell and Stevenson, 2006, p.18). When proposing the concept of policy as discourse, the same constraints apply to individual capability to influence outcomes, due to the way in which policies are framed and the discourse that develops around them (Ball, 1994). Drawing on the work of Foucault, Ball (*ibid.*) claims that discourses provide boundaries within which ideas of truth and knowledge are formed by those groups and individuals in the debate. However, the ideas and opinions that shape such discourses are not value neutral, but reflect the structural balance of power in society "*Discourses are about what can be said and thought, but also about who can speak, when, where and with what authority*" (Ball, 1994, p. 21). While this approach to policy analysis acknowledges the importance of individuals' contribution to how policy is formed, Bell and Stevenson (2006) suggest that policy as discourse is more likely to reflect dominant pressures that drive policy e.g. the economic imperative to develop human capital – the sum of education and skill that

can be used to produce wealth. Ball's "text and discourse" two-dimensional approach reflects the need to see policy as both product and process i.e. the identification of political objectives and the power to transform values into practice. By stressing the importance of policy as process, attention is drawn to the fact that by definition, values are not neutral. They become the focus of discursive struggle with different ideological, social and political forces competing for control. In this conception of policy, power, seen as largely unproblematic in pluralist analysis, becomes central.

Following their study to identify the conditions under which groups and interest groups within organisations unite and form coalitions, Bacharach and Lawler (1980) suggest that a multi-directional flow of power leads us to consider authority and influence as two distinct forms of power. Authority represents a downward flow of power, generally, with the belief that subordinates in an organisation will implement the decisions of superiors. Conversely, sources of influence, for example personal characteristics, expertise and opportunity, are varied and may allow those who are subordinate in the policy developing process to supplant the decisions of those more senior in the hierarchy. Authority is an innate characteristic of hierarchy, influence is not. The corollary of acknowledging the significance of influence as a form of power reveals a fuller picture of policy making at several levels, where decisions are seen as the result of continuous interaction between individuals and collectivities.

> *"While authority may be a prime source of social control, influence is the dynamic aspect of power and may be the ultimate source of change……The context of influence need not be superior-subordinate relations; in fact, influence is the mechanism through which divergent subgroups without authority over one another may compete for power within an organisation."*
> (Bacharach and Lawler, 1980, p.30)

Coalitions primarily form to apply pressure either in support of or in opposition to change. For example when teachers and parents joined together to protest against the introduction of national testing related to the 5 – 14 Development Programme, they were successful (for a limited period) in preventing their implementation (Cassidy, 2008 p.28). Change challenges the status quo as existing practice is often questioned, traditional assumptions can be threatened by rapid economic and social change, and values may be challenged. Under these circumstances, Ball (1987, p.32) claims that *"it is not surprising that innovation processes in schools frequently take the form of political conflict between advocacy and opposition groups"*.

1.3.1   Policy making in education

Ozga (2000, p.36) claims that since the 1990s, the direction of policy taken by governments globally has been economic and that the more social aspects of education are overlooked. Beckman and Cooper (2004, p.5) concur, arguing that education policy in the United Kingdom has become progressively more focussed on economic functions, while wider social and political goals have been marginalised. Gillies (2008, p.86) shares this viewpoint and suggests that current political debate can be categorised under the following four broad headings: economic, a private sector model, social problems and finance. He draws attention to the argument that education has a basic economic purpose. This belief is founded on the human capital theory which sees educational provision as an investment with a two-fold return in terms of future financial opportunities for the individual and a potential economically useful member of society for the state. Gillies argues that looked at from this perspective, academic attainment takes precedence as it enables the state to pre-

determine to some extent the economic function of its citizens. In this context, issues related to class size, nursery provision and curriculum become areas for debate in as much as they contribute to the raising of attainment.

A second debate directs attention to the way in which education is progressively understood from the perspective of a private sector model. In this context the debate is concerned with quality management discourse and involves itself with principles of targets, stakeholders, delivery and excellence; concepts which appeal to politicians as they are able to be measured and used as evidence in political discussion related to the success of government policy.

A third debate focuses on social problems found in sections of the population where discussion is centred on aspects of drug abuse, sexual health, diet and fitness, citizenship and behaviour, to name but a few of the issues which schools are currently expected to address. Political discourse here concentrates on the success of schools in dealing with these issues and the merits of the proposals for change made by different political parties.

The fourth area of political debate centres on financial questions in education. Gillies (2008, p. 87) claims that since the time of the monetarist theory associated with the Thatcher leadership of the Conservative Party, successive governments have favoured the policy of low public spending. This has led to debates on student fees and grants, and controversial spending on a school building programme financed by private capital, but paid for by public money over many years. Arguably, of more

interest to the working life of teachers, is the debate surrounding the closure of many special schools, which resulted in an increase in pupils with additional physical, emotional and behavioural needs being introduced into mainstream classes? Gillies highlights the suggestion that this change may have been related more to cost-cutting policy than to catering for the rights of individual children.

1.3.2   From a Scottish perspective

Ozga (2000, p. 1) and Humes (2008, p. 69) both agree that policy making is a contentious process, struggled over and arrived at through negotiation and conflict between different groups, with difficult decisions being made over priorities, funding and timing. Issues surround the meaning of the term "policy," which the authors above claim is dependent to some extent on the different perspectives available to the researcher. It can be examined in simple terms as the actions of governments and the legislation used to put their ideological commitments into practice. For example, when the Labour Party came into power in 1964, following a period when the Conservatives had been in government for thirty-three of the previous forty years, the commonly held belief was that Britain had a prosperous future. In an effort to ensure that the less fortunate in sections of society shared in this apparent wealth, the in-coming Labour government formulated what they saw as egalitarian education policies. In contrast, during the last two decades of the 20th Century the considerable change introduced in education throughout Britain by the Conservative government was considered to privilege economic purposes rather than the more social aspects of education (Ozga, 2000, p. 36).

Scotland lays perhaps a dubious claim to a "distinctive" form of education system, traditionally declaring to be more democratic and egalitarian than elsewhere in Britain (see Bryce & Humes, 2008, chapter 10). The current position in Scotland is that policy is initiated and taken forward by the Scottish Government, led by the First Minister. This may take the form of introducing or amending legislation, the issue of circulars and memoranda to local authorities and schools, or attaching financial incentives to particular initiatives, such as providing free professional development courses for teachers. Stability in political life can be fragile due to the frequency with which leadership changes (Humes, 2008, p.70; Gillies, 2008, p.83). During the period 1999 to 2007, the Scottish Executive Education Department (SEED) was under the leadership of five different ministers, with only one, Peter Peacock (2003 – 2006) holding the post for an extended period of time. This problem is seen as a global issue by the Organisation for Economic Cooperation and Development (OECD), who have recognised that in recent years, changes in government, expert commissions and numerous reports recommending extensive education reform, have resulted in instability in education systems in many countries (OECD, 2004). The result of this lack of continuity is that politicians rely heavily on the advice of officials, predominantly civil servants.

This leads to a second perspective, which could be obtained through a focus on policy as a process, involving what Humes (2008, p.69) calls a "*policy community*" comprising individuals and institutions representing different interests, both inside and outside of government, with the responsibility for ensuring that policy commitments are implemented within local authorities and schools. An important

member of the policy community is her Majesty's Inspectorate of Education (HMIE)

which to all intents and purposes comprises civil servants, with a background in

teaching, operating as a separate Executive Agency. Despite the position that HMIE

may hold within the policy community, teachers commonly see inspectors as a

threat; as agents of state control who will judge and control them. These suspicions

are shared by Weir (2008) and Humes (2008) who argue that it is unlikely that those

appointed by the state (HMIE) will place the interest of the public (teachers) above

those of ministers who approve or prescribe their permanent responsibility i.e. to

help support the processes of continuous improvement and raising standards in

education (Weir, 2008).

1.3.3   Non-Departmental Public Bodies

As Scottish education has expanded from the 1960s, the number of agencies with an

interest in policy development and implementation has increased. Included in these

Non-Departmental Public Bodies (NDPBs) related to schools are Learning and

Teaching Scotland (LTS) the advisory body on the curriculum 3 – 18; the Scottish

Qualifications Authority (SQA), which runs the examination system; and the General

Teaching Council for Scotland (GTCS), which controls entry to the teaching

profession (Menter & Hulme, 2008, p.320)[1]. Humes suggests that while these

NDPBs are dissimilar in their constitution, all co-operate in partnership with central

government and as members of the policy community, share in the "*assumptive*

world" (Humes, 2008, p. 71) of officialdom and as such, are averse to question

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[1] On 1 July 2011, **Education Scotland**, an Executive Agency of the Scottish Government was created
by bringing together the resources and the functions of Learning and Teaching Scotland, Her
Majesty's Inspectorate of Education, the National CPD Team and the Scottish Government's Positive
Behaviour Team.

policy procedure or decisions. Further groups who perhaps take a more campaigning

stance when consulted on policy matters include the Convention of Scottish Local

Authorities, the Educational Institute of Scotland and other professional associations,

and the Scottish Parent Teacher Council. Humes (2008, p. 71) posits that although

these various groups may differ on specific issues, they contribute to the same

"*received wisdom*" that policy making in Scotland is based on partnership, consensus

and consultation and find nothing problematic with the practice of those entrusted

with formulating, developing and implementing it. From this it could be argued that

the new Scottish Government has embraced a pluralist approach to policy

development.

Humes (2008) and Ozga (2000) claim that this manner of policy development is

being increasingly challenged and introduce the concept of "narrative privilege" to

describe the manner in which governments and other political figures and groups are

able to compose, codify and disseminate the official version of events. Critics of the

policy community query the use of patronage in appointing members of committees

and working groups; the manner in which research is commissioned and used to

inform and evaluate policies; and the use of confidentiality in controlling the release

of information. Humes suggests that in these circumstances the voices of central

government and NDPBs are heard more regularly than those of other stakeholders,

frequently reporting matters in a way that brings credit to them. Arguably, this is

done through the "power of discourse" in support of the ideas that shape and frame

the policy agenda that teachers are expected to follow. There has been a change

from the central concepts of citizenship, equality and justice to concepts of clients,

stakeholders, standards, values, improvement, excellence, ambition, achievement, skills and capacities, leaving us with a situation where economy and efficiency are discussed as if they were values (Ozga, 2000, p.6; Humes, 2008, p.72).

The third perspective suggested by Humes is an examination of the content of policies and their implications for educational establishments and the workforce (Humes, 2008, p. 69). It could be argued that inevitably, the successful implementation of educational policy is reliant on the expertise and commitment of teachers. Bell and Stevenson (2006, p.72) posit that the social function of education is at times complex and contradictory, supporting Humes' suggestion (2008, p.77) that the "unwieldy and complex" nature of policy implementation becomes evident at the point when it is presented to teachers due to individual differences in understanding and receptiveness to new ideas. It is from this third perspective that the empirical study takes its focus.

1.4   The concept of stress

Prior to the study taking place a small number of people (7) from outwith education were asked to write down their perception of the word "stress" and any measures they took to relieve stress in their life (Appendix 4). These seven individuals worked in various occupations including I.T; Operations director; doctor/ anaesthetist; housewife/mum; registered nurse; social worker; delivery driver. The aim was to gain a preliminary indication of whether there were similarities or wide variations in the general public's concept of stress. All responses had a negative connotation including psychological factors such as the "*physical and mental symptoms of*

unresolved problems"; "*a frightening and worrying experience, causing concern for health*"; "*feeling anxious and unable to concentrate*"; and physiological factors such as "*a regular feeling which is the result of overwork, personal problems and today's financially focussed lifestyle*"; "*lying in bed unable to sleep thinking about problems needing sorted*"; "*trying to organise the many activities of the day – as is now normal for toddlers*"; "*(stress) this leads to neck pain. And poor sleeping patterns. Struggle to do basic tasks*"; "*doing far too much too often, not having enough quality time for yourself, not knowing when to say no*". The respondents all appeared to recognise the stress in their life and to take measures to relieve it through physical activity, making use of social relationships, using alcohol and being pragmatic. For example, "*Exercise, relaxation, lots of red wine*"; "*friends and fun, talking loads to people about what's causing stress. Sometimes alcohol*"; "*go for a run or drink a bottle of wine or two*"; "*keep a diary-think about the next day in the evening and try to plan wisely*"; "*I work out what is causing the stress and then look for a solution*"; "*take some time out, speak to colleagues or line manager. Try to prioritise workload. Try to relax at home by listening to music*"; "*try to slow down, go to the gym, also get enough sleep, and drink less alcohol*".

1.4.1   Occupational stress

The field of reference for the study is occupational stress and is addressed in this section by drawing on the findings of several researchers, including the work of Travers and Cooper (1993), in particular their sources-of-pressure item bank, which was adapted to suit the needs of the current investigation. Notwithstanding the work

by Johnstone (1993) and Hall, Wilson and Sawyer (2000) in Scotland, gaps in the literature in relation to the situation in Scotland are identified.

The association between various sources of occupational stress and the resulting manifestations of stress has been the subject of a fairly large body of literature. During the past twenty years or so there has been a gradual, but steady increase of international concern on the subject of stress in teaching as can be evidenced by the number of studies undertaken in various countries. For example, in the UK (e.g. Dunham, 1992; Travers and Cooper, 1993, 1996; Wootton, 2002; Carlyle and Woods, 2002; Jarvis, 2002) and specifically in Scotland (Johnstone, 1993; Hall, Wilson and Sawyer, 2000, Wilson, 2002), in USA (e.g. Bartlett, 2004), Europe (e.g. Borg and Falzon, 1989; Vandenberghe and Huberman, 1999), and Australia (e.g. Pithers and Sodden, 1998) have investigated the extent to which stress is prevalent in educational settings and the cost in terms of adverse effects on people and the economy.

In his roles as teacher, educational psychologist and freelance stress management consultant, Jack Dunham has been well placed to collect data to help identify the signs, causes and effects of stress in teaching, particularly following the Education Reform Act (1988) in England and Wales, and more specifically within the Reform act, the introduction of the National Curriculum. Findings from his research will be further discussed in the review of literature on workplace stress in chapter 4 (4.2.6), but an overview suggests that a number of the main causes of pressure for teachers in the 1990s in England were related to changes in terms of increased accountability

and time required to implement the new National Curriculum; pressures from pupils' behaviour; and problems caused by difficult working conditions (Dunham, 1992). These findings were key factors influencing the initial stages of the present study in 2005: an investigation of the job factors which teachers report cause them anxiety or stress. Looking specifically at Scotland in research undertaken by Margaret Johnstone (1993), the findings indicated that workload was the most frequently reported cause of stress, plus new demands, administrative tasks and planning associated with change. In a review of the literature related to teacher stress by Valerie Wilson (2002), which updated the work carried out by Johnstone in 1993, Wilson claimed that there was little evidence available for studies which related specifically to the teaching profession in Scotland or included reference to Scottish teachers within larger UK studies; only 14 out of 897 references. Wilson found that the most relevant research on teacher stress in Scotland was provided in two studies for the Scottish Council for Research in Education (SCRE) by Johnstone (1993) and Hall, Wilson and Sawyer (2000). Both were funded by the Educational Institute of Scotland (EIS) and both, perhaps as may have been predicted in EIS-funded studies with a potential for bias, showed that teachers perceived their workload to be increasing. She also concluded that there was evidence of a potentially adverse impact of educational innovation on Scottish teachers. Two additional studies (Wilson and McPake, 1998; Malcolm and Schlapp, 1997) reported that teachers believed there were increasing demands on their time, leading to greater feelings of stress. Wilson's (2002) findings are relevant as they indicate a gap in reporting the experiences of teachers in Scotland.

It is clear that there has been very little acknowledgement of the stress building in the Scottish education system regarding teachers' workloads and how this will impact on the quality of Scottish children's education. This study is intended to make a modest contribution to this gap in the knowledge by updating the research on Scottish schools following changes in educational policy introduced by the Scottish Parliament from 2000. Although the study is small and independent, it adds to the knowledge base on teachers' welfare and (by association) the possible impact on teaching and learning in primary schools.

1.5   The literature search

This section gives an overview of the literature covering three separate conceptual fields. The first of these, policy-making theory (discussed above in 1.3), considered different perspectives and issues related to the policy-making process and the place of power and influence within that process. The direction of the debate then led to the policy-making process in Scottish education and the "policy community" therein, prior to a critique of selected education reforms in the second half of the 20th century within the UK as a whole, which takes place in chapter two. Chapter three outlines the development of education policies implemented by the new Scottish Parliament, in particular *A Teaching Profession for the 21st Century (The McCrone Agreement)*. The discussion includes issues related to teacher professionalism and continuing professional development, an integral component of the McCrone Agreement. Chapter four concentrates on stress theory, outlining a number of different approaches prior to a focus on the work of Guglielmi and Tatrow (1998), whose review of teacher stress and burnout is distinctive among the vast and growing

occupational stress literature, as it claimed to be the first comprehensive critical review of the existing literature on the relationship between teacher stress and burnout, and adverse health outcomes. The chapter concludes by outlining the aims and research questions for the study. Chapter five evaluates the suitability of a number of research methodologies to address the research questions, guided by the writing of several authors, e.g. Cohen, Manion and Morrison (2007); Denscombe (2002) and Robson (2002). The Chapter discusses the rationale for the research methodology adopted and concludes by describing the data collection and analysis strategies.

Various sources and databases were searched for literature relevant to the different themes in the study. Evidence was obtained from the databases ERIC (Educational Resources Information Centre) and Google Scholar. Many professional journals, inter alia the *Journal of Education Policy, Oxford Review of Economic Policy, European Journal of Operational Research, British Journal for Educational Studies, and Oxford Review of Education* provided professional reading related to policy theory. The *Journal of Inservice Education, Scottish Educational Review* and *Professional Development in Scotland* in conjunction with chapters in books, particularly Bryce and Humes (2003, 2008) and numerous policy documents published by both the UK government and the Scottish government were useful publications for a study of implemented educational reform. The *British Journal of Educational Psychology, Journal of Educational Studies, Review of Educational Research, Journal of Occupational Psychology* and *Journal of Occupational Health Psychology,* presented ongoing research and papers related to the literature search on the theory of Stress. The majority of the journals were accessed online via the Shibboleth process of the university library. In addition to the electronic sources and

journals, a number of books were particularly helpful, specifically by the authors

Bell and Stevenson (2006), Vandenberghe & Huberman (1999), Travers and Cooper

(1993), Guglielmi and Tatrow (1998), Robson (2002), and Patton (2002). Other

sources explored included published theses and the media. Keywords used in the

search were: "education reforms", "occupational / workplace stress", "cause / effects

of stress", "teaching", "impact" "policy", "Scottish government". The initial search

began in 2005 and was confined to studies undertaken in the previous 10 -15 years

unless they were considered to be of particular relevance to this study.

1.6   The purpose of the study

Informed by this background reading, this study evolved from initial reflections to

have three main purposes. Firstly, within a context of the early years of the

implementation of new Scottish Government[2] policies and the changes introduced, it

was a unique opportunity to investigate the effect these policies may be having on

the professional life of teachers in relation to workload and career choices.

Secondly, given the expression of feelings of stress reported by colleagues and the

interest shown by researchers into the phenomenon of workplace stress, it was

important to explore if feelings of stress were directly related to policy change or

more to the traditional stressors reported in previous research. Thirdly, there was an

intention to help fill the gap identified by Wilson (2002) and make a modest

contribution to studies conducted in Scottish schools. Bell and Stevenson (2006, p.2)

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[2] The **Scottish Government** is the executive arm of the devolved government of Scotland. It was established in 1999 as the **Scottish Executive**, from the extant Scottish Office, and the term Scottish Executive (or Administration) remains its legal name under the Scotland Act 1998. Following the 2007 Scottish Parliament election, the term *Executive* was changed to *Government* by the Scottish National Party administration in 2007. The Scotland Bill (2011) contains a clause which, if the Bill passes into law, will make this change legal in statute.

suggest that it is often difficult for those working in schools to make sense of the policy contexts that are imposed upon them. The study was therefore an opportunity to give a voice to teachers working in schools, albeit within a limited geographical location as outlined below (section 1.8).

1.7   The professional relevance of the research inquiry

This study is relevant in several respects. First, it is relevant in terms of the timeliness of the research, which takes place in the early years of the new Scottish Parliament, following the introduction of policy initiatives and teachers' career development as outlined in the McCrone Agreement of 2001. Second, it is relevant in terms of practical needs, namely the health and well-being of teaching staff in the schools in the study and possibly further afield. Third, it is relevant in terms of contributing to existing knowledge and information gathered, however modest, on the topic of occupational stress in some Scottish schools.

1.7.1   Teachers' career development

The relevance of this study to the career development of teachers lies in the recognition that the education that teachers receive prior to graduation cannot provide them with all the knowledge and skills they will require throughout their professional life. Wilson, Hall, Davidson and Lewin (2006) state that in several countries in Europe with a focus on lifelong learning, reference is now made to teacher development as "continuing professional development" in preference to "in-service training", the implication being that:

> *"The term encompasses a larger range of possibilities for professional development, which support continuity and coherence between different stages of a teacher's professional career"* (Wilson et al, 2006, p.12).

CPD for teachers has been the focus of debate for some time (e.g. Marker, 1999, Humes, 2001; Purdon, 2003). The principal remit of the McCrone Committee was to make recommendations on the way in which teachers' pay, promotion structures and conditions of service should be changed to ensure a committed, professional and flexible teaching force that would secure high and improving standards of school education for all children in Scotland into the new millennium (SEED, 2000, para. 1.2). In proposing a mandatory 35 hours per annum for CPD, the McCrone Report (2001) recognised the importance of CPD both as a professional entitlement and as a professional obligation (Wilson, Hall, Davidson and Lewin, 2006). A new career structure, the chartered teacher scheme (CT)[3], was introduced for experienced teachers who wished to remain in the classroom rather than undertake a role in management. The CT scheme was seen as a means of benefiting pupils by attracting and retaining effective teachers, and also as a means of ensuring that all teachers have the opportunity to be involved in professional learning that promotes the widespread use of successful teaching practices. Wilson and Bagley (1999) however, have suggested that by making CPD compulsory, some teachers may fulfil the obligation in the quickest, easiest way. Since CPD is an integral component of the McCrone Agreement and the CT scheme was seen as a significant career step for teachers, it was relevant to investigate the ways in which teachers were availing

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[3] As of February 2012, the Chartered Teacher scheme has been scrapped by Michael Russell, the Education Secretary. The scheme has been replaced by a new, masters-level qualification. This may be evidence of change upon change in educational policy that has been characterized by what Stronach and Morris (1994) have termed 'policy hysteria', involving frequent cycles of recurrent reform.

themselves of the opportunities to enhance their professionalism through CPD and to further develop their career through the CT scheme. The study was also therefore, an opportunity to investigate whether these career opportunities were a further source of occupational stress for teachers.

1.7.2 Stress and illness

The relevance of this study to the health and wellbeing of school staff is supported by the recognition that stress in the workplace is a national and international concern. Here I provide three examples of evidence of this concern. First, at a UK level the Trades Union Congress (TUC, 2000) acknowledged recurring studies confirming the huge numbers of individuals suffering from the effects of workplace stress. Congress requested that the Health and Safety Executive take action to tackle several issues that included excessive workloads, low staffing levels and long hours; all of which it believes contribute to employee stress. Second, looking particularly at the teaching profession, the Teachers' Benevolent Fund gave support to the setting up of Teacher Support Line Scotland (2005) to enable teachers to have more rapid access to support. Third, the General Teaching Council for Scotland (GTCS) highlighted the need to develop:

> "*an extension of the Council's powers into the area of competence and ill-health*" in its role as "*guardian and protector of the profession and professionalism of teachers*" (GTCS Minute, 7/11/2001).

 Guglielmi and Tatrow (1998) reported that teacher stress and burnout affect the learning and teaching in schools to the extent that they may lead to teacher detachment, cynicism, absenteeism and ultimately the decision to leave teaching. Stress may have an impact on the health of individual teachers, which in turn may

lead to additional expenditure for the education system in terms of lost teaching

hours and additional costs of replacing teachers (Travers & Cooper, 1996, p. 35;

Wilson, 2002, p.11). Research has shown that teacher stress is related to factors

intrinsic to teaching, to individual personality and to systematic factors (Dunham,

1992; Kyriacou, 1998). In a study carried out on all small primary schools in

Scotland (N= 893) the researchers, Wilson and McPake (1998), identified the

pressure linked to the role of the teaching headteacher, particularly to the pace of

change when several changes are introduced consecutively over relatively short

periods of time. One Headteacher reported:

> *"Although I agree with the philosophy (of 5-14) … there is simply not enough*
> *time to cover all the targets. TIME, TIME, TIME – there is not enough hours*
> *in the day"*
>
> (p.5)

Coming within a relatively short space of time after the introduction of the 5-14

Development Programme in the 1990s, the National and Local Authority (LA)

initiatives introduced from 2000, including the most recent innovation, CfE,

implemented in full in 2010, may be seen as yet more change upon change and for

this reason alone, may be perceived as added stress and workload for schools.

1.8   Schools in the study

The initial stages of the study took place in June 2005 when a questionnaire was sent

out to schools. The schools are situated in a major Scottish city where economic

restructuring has removed much of the heavy industry on which the city had

traditionally relied. The impact of this resulted in severe cumulative effects for many

of the inhabitants through lower incomes, poor housing conditions, and the break-up

of family structures, ill health, high crime, low educational achievement and complex

social problems. Promoted staff and class teachers from five primary schools and one secondary school, whose headteachers agreed to the study taking place, responded to the questionnaire. Four of the primary schools are associated schools within the same local authority cluster and have the same associated secondary school and so they draw from the same population of pupils. The fifth primary school is affiliated to a secondary school in an adjacent geographical area. Information taken from an HMIE website, school reports, show that the catchment area served by the secondary school includes some of the most deprived areas of Scotland; however recognition was given to the fact that pupil attendance was in line with the national average in 2008/2009. This was noteworthy since around the same time, pupil attendance in all of the primary schools was below the national average and in one school attendance was well below the national average.

In two of the primary schools the proportion of pupils who were entitled to free school meals was well above the national average. Children in areas of social deprivation can face a variety of issues that present difficulties for them and the school. It is often thought that behavioural issues are the reason why some schools are labelled "challenging" however, factors such as poverty, parents' working patterns, a transient population and a high proportion of a community whose first language is not English, can all contribute to problems of low achievement and schools described as challenging. To avoid unnecessary repetition, fuller discussion of the sampling strategy and the study population takes place in chapter 5 (sections 5.6 and 5.7 respectively).

1.9   My position in the research

I have 21 years teaching experience, 19 of them in my current school (one of the above primary schools), situated as outlined above, in a geographical area with complex socio-economic problems. Like many teachers, I believe in enabling children to realise their potential and make a success of their lives, especially against a disadvantaged background. The topic under study is related to the well-being of teachers and so does affect their classroom practice and consequently the experience of their pupils. The major education policies introduced during my teaching life - including the 5 – 14 Development Programme, National Priorities in Education, the McCrone Agreement and Curriculum for Excellence – all brought additional heavy workload, and so I am aware that objectivity on my part may well be compromised by this experience, shared as it is by most colleagues as participants in the study. I should also declare that I have encountered stressful experiences as a teacher, often from causes other than workload. The research was undertaken however, with the genuine intention of resisting the potential bias of such personal experience, and of retaining an open mind in exploring stress and anxiety reported by colleagues and of making the research as rigorous as possible.

While acknowledging bias as an insider, this perspective does offer certain advantages, such as access, trust and familiarity with the language and culture of the school and the staffroom. For example, I am aware that teachers do complain on occasions about a range of issues affecting them and, although much staffroom talk in the formative stages of developing the research topic and questions was about workload produced by policy changes, the inquiry was developed to discover if this

was a main cause of occupational stress or only one of a wider set of causes in the sample population.

1.10 Summary

This chapter has provided an introduction to the research inquiry and the overall focus and purpose of the study, which is an investigation of the impact that changes in education policy introduced by the new Scottish Parliament may have had on the professional life of teachers in the study (with particular attention to stress). To gain some understanding of the nature of policy, the debate related to educational policy was introduced and described from different perspectives. The chapter continued with a brief outline of reports of stress in the workplace, among which change and workload were highlighted. Chapter two will discuss the issues surrounding educational policy from a UK perspective.

Chapter 2   Changes in educational policy in the United Kingdom

2.1   Introduction

This chapter is a historical perspective which examines studies showing the impact
that several decades of school reform, undertaken by successive governments, have
had on the teaching profession. In the past in Scotland, educational policy had
focussed on positive achievements such as expansion, progression and equality of
provision, leading to notions of distinctiveness and superiority as points of national
pride (Anderson, 2003, p 219). However, it is argued that, in more recent times, the
increasing involvement of central government in education has led to policy-making
becoming highly politicised (Olssen, Codd and O'Neill p. 3).

Bell and Stevenson (2006, p.8) argue that across many nation states, within
education, whether national or local:

> "*State policy has a considerable impact on shaping what happens on a daily
> basis in schools and colleges and the lived experiences of those who study
> and work in those establishments*".

The relationship between the educative process and the state and assumptions about
the purposes of education, helps to form the nature of policy. This has seen several
important, interconnected themes appearing within educational policy making over
the last two decades. A number of writers (Beckman and Cooper, 2004, Ozga,
2000, Gillies, 2008 and Humes, 2008 in 1.3.1 and Bell and Stevenson (2006 p.1)
identify two main themes - human capitalism and citizenship, and social justice -
linked with a third set of themes, markets, choice and accountability - which
currently drive educational policy-making at a global level. Whilst policies that

promote this connection have taken various forms in different countries, it is claimed that accountability now assumes a dominant position in the global educational agenda. This chapter highlights a number of educational reforms in which accountability is apparent through the operation of market forces, choice, school-based management and performance appraisal in specific policy contexts.

Factors associated with change itself are identified from several studies on teacher stress as outlined in chapter 4, so the aim here is to describe the main changes over the last 30 years that have arguably contributed to developing workload issues for teachers. For example, Timperley and Robinson (2000) cite research (Campbell & Neill, 1992), which showed that as local authority involvement in management of schools increased, the percentage of time teachers spent in non-teaching duties rose from 42% in 1971 to 56% in 1990. This development is confirmed by findings from a workload survey of Scottish teachers (Hall *et al*, 2000) in which 83% of respondents (N=1,014) reported that they spent more time on records and reports than before, giving an indication of some effects of change on the profession. Discussion in chapter 4 (4.2.8) is related to a further aspect of change which may be associated with stress, namely, the drive to improve school standards.

Bryce and Humes (2003, p.4), argue that there is a lack of informed accounts dealing specifically with the broad front of Scottish education, and since differences between Scottish circumstances and their equivalents elsewhere in the UK and Europe have diminished somewhat over the recent past, the chapter begins by outlining the major changes which took place in the United Kingdom while the Conservative Party was

in power towards the end of the 20th century. A brief historical account of the legislative framework which sets the Scottish education system apart from other countries in the UK follows. The chapter subsequently deals with the primary sector, outlining the conceptual framework inherent in The Primary Memorandum, (SED, 1965) which informed the ideology of later policy change. The impact of the 5 – 14 Development Programme is described before focussing on the secondary sector where the change to comprehensive schooling, while welcomed by many, did bring challenges, for example, an increase in the school leaving age to 16 resulted in a need to cater for greater numbers of pupils remaining in full-time education past the age of 15 years.

2.2   Changes in educational policy in the United Kingdom in the 20th century

In recent times, education policy has focused on a target-driven and problem oriented culture, resulting in conflict between teachers and central government (Beckmann & Cooper, 2004, p.18). In the latter half of the 20th century, significant legislative and policy changes took place in education throughout Britain, often, posited by Machin and Vignoles (2006), with the explicit intention of making it more productive. Their review of empirical evidence which looked at the impact of some key reforms introduced in the 1980s and 1990s, indicated that a number of factors were giving cause for concern, specifically poor and apparently falling standards in schools, the low staying- on rate at age 16, the relatively poor basic skills of the UK pupil population and persistent inequalities in Higher Education. These factors led the then Conservative governments to introduce a number of education reforms to raise the standard of education achieved by pupils.

Data supported the claim that compared to other countries, the number of pupils in the UK remaining in full time education past the age of 16 was low; and there had been little progress made in the number of pupils achieving the equivalent of 5 or more upper-grade passes in the GCSE examinations (Machin and Vignoles, 2006, p.2). The introduction of the 1988 Reform Act (HMSO, 1988) created a market-oriented system in education which, inter alia, increased the power of parents in relation to school choice and in certain cases allowed schools greater freedom over which pupils were admitted to the school (Machin and Vignoles, 2006). Test score information that had been made available to parents was subsequently represented in the media as educational league tables showing the position of schools relative to one another in terms of their examination success rates at age 16. These reforms were designed to make the school-based education system more consumer-oriented.

Machin and Vignoles (*op.cit.* p.4) and Besley and Ghatak (2003, p. 235), however, question the effectiveness of an education system's use of choice and competition and the role of incentives, widely used in the private sector, where the goal generally is to maximise profits. The key problem facing policy makers appeared to be that of configuring how competition, incentives and accountability could be successfully managed to encompass the broad spectrum of educational outcomes (Besley and Ghatak, 2003).

Evidence, particularly from the United States, indicates that greater competition amongst schools and the move to decentralise school finance can lead to raised attainment. Conversely, these strategies may advantage richer parents who are more

"au fait" with market-oriented concepts and thus lead to greater inequality, resulting in more able pupils from poorer economic and social backgrounds falling behind (Machin and Vignoles, p.4). This is significant in the UK context where there exists what Machin and Vignoles describe as a "*long tail of low achievement*" (p.2). The claim that "*higher income buys greater choice*" is also contested by West and Pennell (1997, p. 285) who challenge the suggestion that those living in disadvantaged areas are able to have the same opportunities of choice. Evidence supports the claim that high socio-economic groups not only have better information and understanding of league tables, but also have the financial means to live near to high performing schools located in affluent areas. As a result, parental choice may lead to greater segregation across schools. There is a strong link between child poverty and educational outcomes, so those schools with a high number of pupils from disadvantaged backgrounds may be expected to experience greater educational and behavioural difficulties (West and Pennell, 1997).

2.2.1   Impact of market-oriented reforms

The driving force behind the introduction of the reforms was to raise standards and achievement. Machin and Vignoles (2006) claim however, that that there is little evidence, especially in the UK, that the reforms have had a positive impact on pupils' achievement. Although Bradley, Johnes and Millington (2001) concluded that increased competition between schools led to improved exam performance, more recent research (Gibbons, Machin and Silvia, 2006) attempted to identify a causal link between choice and competition and the academic achievement of primary school pupils in England. Their research concluded that for pupils at Community

Schools – the standard state primary in the English system – there was no relationship between achievement for pupils and the competitive pressures faced by the school. The evidence suggested that competition may improve school performances for some of the one-in-five pupils who attend faith autonomous schools, but their results "*cast some doubt on the general effectiveness of choice and competition in the school context*" (p.36).

The research by Clark, Conlon and Galindo-Rueda (2005), (cited in Machin and Vignoles, 2006, p.2 and p.6) suggests that the entirety of the reforms introduced in the late 1980s and early 1990s had a positive effect on pupil achievement, but Machin and Vignoles caution against interpreting the data thus. There were several concurrent factors, such as the change from the GCE "O" level system to GCSEs which influenced the apparent gains, therefore proving causality is difficult, illustrating one of the problems associated with evaluating the impact of nationally introduced education policies.

 The UK education system had also become less effective in producing workers with adequate levels of basic skills. The younger workforce in the United Kingdom possessed poorer basic numeracy and literacy skills when compared to other countries (Machin and Vignoles, 2006). The government's response was to introduce two further significant national policies; a standardised National Curriculum for all students aged 7 – 16 in England and Wales, and the National Literacy and Numeracy Strategies, introduced in 1998 to develop pupils' basic skills.

National testing of the curriculum was also introduced for pupils aged 7, 11, 14 and 16.

Machin and McNally (2005) undertook an economic evaluation of the National Literacy Project where the literacy hour was introduced in about 400 English primary schools in 1997 and 1998. This pilot resulted in pupils experiencing the literacy hour for two years before it was introduced nationally. The analysis of their results indicated substantial improvements in reading and English for a policy, which they claim has moderate costs. They suggest that improving the way in which teaching is delivered through well-structured lessons can provide a cost effective means of raising pupil attainment.

2. 3   Policy making in Scottish education

Education, the law and the church are three institutions traditionally considered to be socially and culturally distinctive in Scotland (Humes 2008), where there is a long history of universal provision of public education. A major element of the distinctiveness of Scottish education is the separate legislative framework which sets out the nature of the provision and the agencies responsible for its delivery; arguably more so, since the establishment of a Scottish parliament in 1999, followed by the election of a minority Scottish National Party (SNP) administration in 2007 and subsequently by an overall majority win by the SNP in 2011. One objective for the Scottish Parliament was to employ a model of participatory politics involving the public and pressure groups, as well as power-sharing between parties and legislators using the context of consensus politics (Lynch, 2001). Humes (2008) identifies

several approaches to researching policy making in education, including the examination of the manifesto commitments and ideological stance taken by political parties and the legislative framework used by them to transform broad intentions into concrete plans. Another approach focuses on a "*policy community*" (p.69) i.e. the stakeholders both inside and outwith government who represent a variety of interests and are charged with the responsibility of ensuring that policy intentions are implemented within local authorities and schools. A further perspective centres on the content of policies, for example, curriculum, assessment or the professional development of teachers. Although important in their own right, each of these perspectives presents only part of the picture. Humes claims that in advanced democratic societies, policy-making is rarely a straightforward process.

2.4   The historical context

During the second half of the 20th century, as in other UK countries, Scotland had concerns over the quality of teaching and learning provided to children and young people. Cassidy (2008) argues that the first major change, which has major links to modern day policy, was a critical policy document *Primary Education in Scotland* (SED, 1965). Known colloquially as the *Primary Memorandum*, it was intended to share best principles and practice at both a philosophical and pedagogical level. Darling (2003, p. 29) considers that "*it constitutes a landmark which has from the time of publication dominated the primary education scene*". The Primary Memorandum with its philosophy of "natural development" and "freedom to experiment with language" occurred at a time of impending social change on a

radical scale when "*everyone was to be liberated from repressive conventions and pointless pressure to conform*" (Darling, *ibid*, p.31).

However, the findings by Her Majesty's Inspectorate (HMI) – renamed Her Majesty's Inspectorate of Education (HMIE) in 2001 – in an evaluation of teaching and learning in primaries 4 and 7 in 6% of Scottish primary schools, *Learning and Teaching in Primary 4 and Primary 7* (SED, 1980), stated that teachers continued to focus on the basic skills, thus preventing pupils from participating in a more extensive learning experience. In an attempt to address the shortcomings raised in the report, the 5-14 Development Programme (SOED, 1994) was introduced. Unlike the English National Curriculum, the 5 – 14 Programme did not have the force of law, but was issued as "*guidance*" on the curriculum and for this reason was subsequently also referred to as "*The Guidelines*".   In practical terms however, as these were the criteria against which the inspectorate evaluated the performance of a school, observance of the guidelines was binding.

The 5 – 14 Development Programme was a major reform encompassing the whole of the curriculum, assessment, national testing and reporting for pupils of ages 5 – 14, but it did not represent the same impact of reform and change in Scotland as was taking place in the other UK countries (Harlen, 1996, p.2). There was said to be more continuity of structure and content between the 5 – 14 Development Programme and the then current practice in Scottish schools, particularly in the secondary sector where Boyd (2005) concluded that while 5 – 14 was impacting heavily on primary schools, the curriculum in S1 and S2 was virtually unchanged.

An evaluation report commissioned by the Scottish Office Education Department (SOED) in 1991 stated that the introduction of the 5–14 Development Programme may have seemed threatening to teachers. This apparent negativity might have arisen since 5 – 14 was introduced at the same time as further changes in procedures to school management and development planning were adding to the demands made on school staff (Harlen, 1996). In a later report, Malcolm and Schlapp (1997) posited that one of the greatest pressures felt by all school staff was the time-scale set for the implementation of the 5 - 14. Additional non-teaching time was needed for teachers to become familiar with the documents and to attend meetings to become familiar with new concepts in record keeping, assessment and reporting. School development planning however, which was introduced at about the same time as 5-14, was later reported as a positive initiative which gave schools some degree of choice in prioritising the nature and pace of change, thus reducing some of the pressure (Harlen, 1996, p.20).

Although it was addressed at a later stage, in the early years of implementation there was some criticism of local authorities for a lack of support in providing adequate resources and in-service training. As implementation progressed, school staff reported increased confidence and satisfaction in using the Guidelines for forward planning and assessment and recording. However, if the aim of educational change is to lead to improvement in teaching and learning, many teachers felt they could not state that this was the case (Malcolm and Schlapp, 1997). Concerns were raised that increased breadth in the curriculum was leading to a lack of depth in teaching some curricular areas, particularly in the basic skills of literacy and numeracy. Only half

of headteachers and teachers felt that they had evidence to show that the 5-14 Development Programme was leading to improved attainment for pupils.

2.4.1 Changes in the secondary sector

Before the introduction of the 5 – 14 Development Programme teachers in the secondary sector had to deal with arguably, the biggest change to take place in post-12 education, namely the introduction of comprehensive schooling. Despite being partly characterised by the traditional egalitarian myth commonly referred to as "*the lad o' pairts*", Scottish education did not escape the social reforms taking place in a more egalitarian climate following the Second World War. The fairness and reliability of the qualifying examination was questioned and charges of elitism were aimed at the provision of the 3 year junior secondary vocational courses in comparison with the 5 year academic senior secondary curriculum (Bryce and Humes, 2003, p.39). The idea of a system of education that offered a common curriculum core and a common examination for all had been raised in 1947, but it was not until after the election of a Labour government in 1964 that the transition to comprehensive schools became practice.

While he states that comprehensive education fundamentally influenced the secondary school curriculum in the years following its introduction, Gavin (2003, p. 461) suggests that both education authorities and teachers were not prepared for the immense challenges that "*providing quality education for 12 – 18 year olds of all abilities and diverse aspirations*" would bring. Dunham (1992) noted that some teachers looked forward to the new opportunities for fresh patterns of teaching and

involvement in worthwhile developments that new comprehensive schools would bring; while others feared working in larger and more complex schools, teaching pupils who had much wider ranges of abilities, behaviour and attitudes and adapting to major organizational and curricular changes. It may be fair to say perhaps, that secondary schools underwent many more curricular changes than primary schools, many of them related to the raising of the school leaving age and adapting assessment procedures to cater for the differences in ability in the pupil population.

Further pressure for curricular changes followed the raising of the school leaving age from 15 to 16 in 1972; subsequently leading to the introduction of Standard Grade courses and certification for all within a commonly accepted curricular framework, arguably the foremost change in Scottish education after comprehensive schools. As schools and Further Education Colleges saw the need to work together to develop courses suitable for non-advanced academic older students, initiated by the SED's 16-18 Action Plan (1983), a newly formed Scottish Vocational Education Council (SCOTVEC) introduced a modular course system for assessment and certification in colleges. As a response, schools began to develop a range of modular courses attuned to SCOTVEC courses which did not affect those pupils studying for Higher Grade, but which enabled perhaps less-able pupils to progress from Standard Grade in school to entry into Higher Grade courses in their second year of further education.

The existence of two separate examining bodies, the Scottish Examination Board and SCOTVEC, was problematic for teachers and students and confusing for parents and

employers, but more importantly it highlighted the difference between the academic and vocational courses. It became increasingly apparent that there should be one examining authority to cover the wide provision of post–16, non-advanced education in Scotland and this came in to being through the introduction of the Scottish Qualifications authority (SQA) and the establishment of Higher Still development programme in 1993 (Gavin, 2003).

2.5   Equality and raising standards

Along with West and Pennell (1997) and Machin and Vignoles (2006) (see section 2. 2), Bryce and Humes (2003, p.39) believe that although there was policy change that supported the concept of social unity, the advance of parental choice in the 1980s by the Conservative government led to the situation whereby the educational experience that pupils have to some degree, depends on the affluence or poverty level of the area in which they live. There is a powerful perception that a better standard of educational provision exists in schools in more affluent areas where the curriculum is more advanced and the pupils are better behaved.

Together with legislation concerning standards and accountability, Scotland has had to deal with the publication of league table results of attainment in secondary schools of Standard Grade and Higher Grade exam passes. In 2003, around 13% of secondary pupils attended schools outwith their catchment area. Bryce and Humes (*ibid)* claim that this has altered the upward range of ability and socio-economic mix not only of certain "magnet" schools, but also to some extent a downward range in schools in less desirable areas. Machin and Vignoles (op. cit.) suggest that if

wealthier parents act on information enabling them to choose the best schools for their children, then there is a clear tension between strategies to raise standards and policies to reduce inequality.

2.6 Summary

Education has been high on the policy agenda of successive UK governments, particularly in the second half of the 20th century. Many major reforms have been introduced over a period of 60 years. The key reforms which aimed to address the issue of lower attainment of some sections of school pupils have been driven by market forces employing parental choice, competition and the role of incentives to achieve their goal. Arguably, these strategies have instead led to greater inequality between socio-economic communities.

The next chapter provides the background to the implementation of major policy changes by the new Scottish Parliament, which set out in detail the policy dimensions underpinning the developments of this study, including *The Standards in Scotland's Schools etc. (Scotland) Act 2000, National Priorities in School Education* (SEED, 2000a); *A Teaching Profession for the 21st Century* (SEED, 2001) and the latest innovation, *Curriculum for Excellence* (SEED, 2004), fully implemented in 2010 – 2011. The rationale behind the inclusion of these policies is that they do refer quite substantially to the themes of human capital, citizenship, and accountability, discussed in chapter 2.

Chapter 3   Policy implemented by the new Scottish Parliament

3.1   **Introduction**

The initial data for the research was gathered in summer of 2005. At the early stages

of the research enquiry, little had been written about the education policies

introduced by the new Scottish Parliament early in the new millennium. In the

intervening years however, a number of policies and initiatives have undergone

review. These factors prompted an additional literature review to incorporate the

more recent developments relevant to the study. In this chapter, reference is made to

both sets of literature, to ensure that the study is placed within the current policy

environment.

From the time of creation of the Scottish Parliament in 1999, legislation lies with the

Scottish Executive and overall accountability for the education system is now the

responsibility of the First Minister for Scotland. Prior to devolution the New Labour

Party made education a priority (Tony Blair, 1997) and since its establishment,

education has been high on the agenda of the Scottish Parliament and has been a

constituent part of overall strategy with links to policies on economic development,

responsible citizenship, environmental awareness, health promotion and social

capital (Humes, 2008). In January 1999, as Secretary of State for Scotland (1997 –

1999), and subsequently First Minister of the new Scottish Parliament (1999 – 2000)

Donald Dewar stated in a White Paper:

> "*Education is at the heart of the Government's policies in Scotland, with a
> vision of a world class school system founded on excellence*".
> (Dewar, D., 1999, Foreword).

The need for education reform had been highlighted in "*Standards and Quality in Scottish Schools 1995-8*" (HMI, 1999) which found that 90% of primary and 85% of secondary schools had serious weaknesses; a fifth of headteachers were failing to provide good leadership; English and maths for 14 year olds was poor in 40% of schools; and half of all primary school children needed immediate improvement in their reading skills. The White Paper set out a range of important initiatives that provided a framework of challenge and support for teachers, pupils, schools and education authorities. It laid the foundation for the raising of standards in Scottish schools and provided a forum for a national debate on education, taken up by the newly appointed Scottish Parliament in 1999. The White paper targeted excellence in teaching by recommending, inter alia

- continuing professional development

- consultation on teachers' pay and conditions of service

- keeping excellent teachers in the classroom

The resulting first Education Bill to pass through the Scottish Parliament, *Standards in Scotland's Schools etc. (Scotland) Act 2000*, was preceded by a consultation process on a scale unequalled by the pre-devolution Scottish Office. As previously stated in section 2.3, this new Scottish policy style is based on consensus and a more open, inclusive consultation process (Cairney, 2008).

3.2   The National Priorities for Education

In December 2000, five *National Priorities for Education were established*: *Achievement and Attainment*; *Framework for Learning*; *Inclusion and Equality*;

Values and Citizenship; and *Learning for Life* (SEED, 2000a). These were

subsequently endorsed by a National Debate on Scottish Education which involved

extensive consultation with all the major stakeholders including pupils, teachers,

parents, employers and the general public. As in the consultation paper, the second

priority included the reference to teacher skills:

> "*To support and develop the skills of teachers, the self discipline of pupils and to enhance school environments so that they are conducive to teaching and learning*" (National Priorities in School Education, SEED, 2000a, p.1).

The aims of the National Priorities for Education were: to improve levels of

attainment for pupils; to make professional development for teachers compulsory; to

increase the self respect pupils had for themselves and others; and to equip pupils

with the skills and attitudes necessary to prosper in society. These government

priorities and local authority initiatives, which were followed swiftly one year later

by A Teaching Profession for the 21st Century (see 3.2.1 below), involved staff in

obligatory professional development and in yet more familiarisation with new

resources and teaching strategies. Wilson (2002, p. 10) suggested these changes may

be adding to '*longer-standing workload issues'*. Setting targets for attainment in

reading, mathematics and writing for individual schools (the 5-14 assessment

procedures in place when the study took place) was seen as the means by which

standards were monitored and raised, but target setting also imposes accountability

on teaching staff.

3.3   The McCrone Agreement

The Act (2000) gave the GTCS power to expand its role to incorporate career

development for teachers. At the end of the twentieth century the teaching

profession was campaigning for changes to pay and conditions. Targeting Excellence (Scottish Office, 1999) had recognised the need for a salary scale and conditions of service that would recruit, retain and motivate high quality staff. In September 1999, an Independent Committee of Inquiry into Professional Conditions of Service for Teachers, was set up and chaired by Professor Gavin McCrone. The committee's recommendations were published in 2000 (SEED, 2000) and the subsequent agreement "A Teaching Profession for the 21st Century" (The McCrone Agreement), reached in 2001 (SEED, 2001).

The Agreement was intended "*to build a confident and highly regarded teaching profession*" (p.2) by revitalising the profession, making it a more attractive career option and addressing recruitment difficulties. At the same time as problems of recruitment and retention of teachers was being discussed in Scotland, they were also an issue for other countries. In the US, after examining national and state efforts to recruit new teachers, Merrow (1999) concluded that the teacher shortage problem had been misdiagnosed. He asserted (p.64) that the problem was not recruitment, but retention of teachers: "*Simply put, we train teachers poorly and then treat them badly-and so they leave in droves*". He suggested the best remedy for teacher shortage was to focus on retention of qualified teachers, rather than teacher recruitment. Teachers who perceive a lack of support and poor treatment are more likely to view their work as highly stressful, and high levels of stress are reported to be one of the main reasons teachers leave the profession in the early years of their career.

The McCrone Agreement put in place a number of major changes as to how education services would be delivered in Scotland in the future. An integral part of the Agreement was a commitment to develop and support teachers and included an across the board 23% pay increase for all teachers, a new, simplified career structure, the creation of a status of Chartered Teacher (CT), new working time arrangements, lower limits on class contact time and a new emphasis on CPD for all Scottish teachers. The Scottish education system recognized that development of pedagogy, the curriculum, or leadership and management, was a career-long process and not something that occurred during initial teacher education and then intermittently throughout a teacher's career. The formalisation of a CPD requirement by teachers was seen as a key component of the Agreement. All teachers now have an additional contractual 35 hours per year for CPD. They are encouraged to keep a personal CPD portfolio and an individual CPD plan for each teacher is decided upon at an annual professional review.

3.4   Continuing professional development

Teachers' attitudes to the education and training they receive have often been ambivalent. On the one hand they want teaching to be seen as a profession and on the other hand, they are often dismissive of the value of regularly updating knowledge and skills through rigorous professional development as undertaken by other professions such as medicine or engineering (Humes, 2001). It appears that teachers give more status to experiential learning than theoretic, although this attitude has the potential to undermine their own professionalism due to the apparent hostility towards new ideas. In fairness to teachers, negative attitudes might be the

result of pressures emanating from staff shortages, heavy workloads and low morale when "*the priority has simply been to keep the show on the road*" (Humes *ibid.* p. 10). On the other hand, there is evidence of uptake of accredited award-bearing courses, but the general picture remains that of attendance at non-award bearing courses, which reflect the annual priorities for staff development announced by SEED.   Marker (1999) noted that:

"... in practice professional development has been one of the poor relations of the education service. Teachers have not been willing to campaign for it at the expense of salaries or class size; the authorities have regularly had to sacrifice it to meet their statutory responsibilities; successive governments have advocated it without providing the necessary resources"

(Marker, 1999, p. 924) in (Wilson et al, 2006, p. 35).

Humes (2001) argues that the year 2000 was an "*important watershed in the evolution of Scottish education*" (p. 6) in part, due to the McCrone Report and the subsequent development of a national framework for CPD that changed the picture of professional development as described by Marker, above. Following the recommendations of the Sutherland Report in 1997 and Scottish Office consultation on the establishment of a national framework of CPD in 1998, the resulting policy changes became formalised through the Standards for Scotland's Schools etc (Scotland) Act 2000 and the implementation of the Mc Crone Agreement in 2001. Prior to the Agreement, teachers undertook mandatory CPD activities organized by local authorities on five in-service days spread throughout the year. Further CPD was generally left to the individual preference of teachers who chose courses that were of personal interest to them, or that they felt would improve their teaching capability.

In 1999, concerns had been raised in a discussion paper in relation to the interest in CPD shown by teachers (Ming, 1999). Ming suggested that since CPD workshops were usually voluntary, attendance could be low and occasionally workshops had to be cancelled due to lack of interest shown. Reasons suggested for the lack of attendance were that teachers had other priorities on their time, or that they simply were not interested. The McCrone Committee regarded this ad hoc arrangement inadequate to guarantee the provision of sufficient and quality CPD that it felt was necessary to sustain and widen professional expertise in teaching (SEED), 2000).

3.5   Professionalism and CPD

Subsequent to the rapid changes that have taken place in the curriculum and approaches to learning and teaching over the last 10 years, the need for continuing development of knowledge and skills and CPD is now a mandatory and accepted part of the contract of all teachers in Scottish schools; as it is in accountancy, medicine, nursing and social work in the UK (Wilson, Hall, Davidson and Lewin, 2006). In reporting the findings of a review of early professional learning, Wilson et al. stated that some researchers (Wilson and Bagley, 1999) suggested that by making CPD compulsory, members of various professions may seek to fulfill the requirements of CPD in the quickest, easiest way. Wilson et al (*op. cit.*) reported that some teachers define CPD conservatively and associate it primarily with attendance at courses, seminars or workshops. Patrick, Forde and McPhee (2003) however, posit that the proliferation of "in-service courses for all" does not promote developmental CPD and suggest that currently in the UK, the CPD policy initiated not only by successive UK governments, but also by the Scottish Executive together with the GTCs of both

countries has failed to provide a clear rationale for CPD. They claim that a dichotomy exists between the concepts of teacher education and teacher training, arguing that teacher education must move from:

> "*a technicist emphases to a model that integrates the social processes of change within society and schools with the individual development and empowerment of teachers*".
>
> (Patrick, Forde and McPhee, 2003. p. 237)

In agreement with this view, Bolam (2000) claims that currently in the United Kingdom CPD has ceased to focus on the specific requirements of individual teachers, but instead is meeting systemic needs which reflect government policy to raise standards and ensure managerial accountability.

In her discussion of the conflicting conceptions of professionalism, Kennedy (2008) appears to support the suggestions made by several of the researchers above. She agrees that the investment in CPD in terms of both finance and time are evidence of the major importance attached to CPD in Scottish education. What she questions however, is the underlying principle behind the investment. She argues that there appears to be no "*articulated and agreed purpose*" of CPD other than that it is understood to be a key characteristic of being a professional (p.842). Referring to the work of Sachs (2003), Kennedy claimed that education policy makers are reinforcing the concept of managerial professionalism in teachers through a focus on the accountability and effectiveness features in CPD policies. While arguing that the Scottish professional development system largely encompasses a long-standing ethos of teacher education, Patrick et al. (2003) posit that in both Scotland and England CPD is beset by tensions between notions of competence and notions of effectiveness and excellence. Conversely, McGeer (2009) argues that some more

recent national developments such as "Assessment is for Learning" and the most recent initiative "Curriculum for Excellence", with their focus on teaching and learning approaches, may be altering the balance towards personal professional development.

In a different project, Kennedy et al (2008) sought to investigate key informants' perspectives on teacher learning in Scotland. "*Key informants*" in this case included members of the "*policy community*" as described by Humes (2008) earlier in this thesis (see section 1.3.3). Kennedy et al (*ibid*) found general approval of the additional CPD structure set out in the McCrone Agreement, but some respondents expressed concern that provision might not be consistent throughout the country. However, Kennedy et al (2008, p. 411) suggest that uniform provision arguably promotes a provider-led model of CPD where teachers exercise their right to access to similar opportunities, rather than choosing to access CPD that might be more appropriate to their own context.

Several of the interviewees expressed the opinion that there was a sense that some teachers considered the additional 35 hours had been imposed upon them, and that it was seen as a burden, an occupational requirement and not an opportunity to expand their own professional and personal learning. A few of those interviewed suggested that teachers may not view the additional CPD positively, but might regard it as another "box-ticked" requirement in the quality assurance process. A further observation made by Kennedy et al (*ibid.* p.415) was that the key informants held the view that teachers themselves showed a preference for more structured, formal CPD

opportunities. From this viewpoint it was suggested that teachers favour a more managerial conception of professionalism promoting efficiency and accountability. Given Humes' (2008) (section 1.3.3) argument linking the policy community and the promotion of policy through the "*power of discourse*", is it unreasonable to question whether the views of those responsible for delivering / promoting CPD opportunities do so with the interest of teachers in mind or the promotion of official government policy?

The standard- based framework of CPD now in place in Scotland promotes a managerial conception of professionalism through an emphasis on individual competences, while the McCrone Agreement places emphasis on collegiality and collaborative working, more in keeping with a democratic conception of professionalism (Fox, 2009; Kennedy, 2008).

3.6   The chartered teacher programme

The decision to create a post of CT was part of the comprehensive package of changes set out in the McCrone Agreement and was thought to be one of the most significant career structures to be put in place for teachers for many decades. It was established as an opportunity for career advancement for experienced teachers to remain in the classroom, especially "*teachers of acknowledged excellence*" (SEED, 2001, p.71). McGeer, (2009) however, suggests an alternative reason for the establishment of a post of CT was the perceived need to encourage main grade teachers at the top of the salary scale to participate in worthwhile CPD.

"*Every child in Scotland deserves the chance to achieve his or her potential. A world class education system that maximises opportunity for all, depends on a high quality profession*" (GTCS, 2003).

Completion of the qualification-based CT programme was one means by which teachers could elevate the status of their individual professional competence, denoting the level of accomplishment teachers might seek to achieve following the Standard for Full Registration. The Standard for Chartered Teacher (SCT) demanded professional practice over and above that of the contractual duties of a teacher which result in effective teaching and learning. The CT would be committed to promoting and developing educational excellence not only throughout the school, but in the wider professional community (Scottish Executive, 2002). The framework of the CT programme was linked to improvements in learning and teaching and therefore to pupil attainment and encompassed part of the national framework for teachers' continuing professional development:

"*The Chartered Teacher Programme aims to encourage teachers to focus on the enhancement of teaching and learning and to separate the concepts from those of administration and management*" (SEED, 2002 p.1).

The route to CT was a personal career choice made by an individual teacher, open to staff who were registered with the GTCS, who had reached the top of the main grade pay scale and who had maintained a CPD portfolio. Progression through the CT scale was by qualification and since accomplishment in it carried considerable financial rewards in terms of salary increments, it was agreed that progress through this award should be entirely funded by the individual teachers taking part. To encourage participation in the Scheme, two routes to chartered teacher status were created. The first, on completion of twelve modules, usually over a period of six

years (with a salary increase after each of two modules); and an alternative route through the accreditation of prior learning experiences, evidenced by teachers and assessed by the GTCS (entry to the accreditation route ended in 2008).

The information on CTs has been superseded by the decision of the Cabinet Secretary for Education and Lifelong Learning, Michael Russell, to rescind the post of CT in February 2012, following recommendations made in a report by Professor Gerry McCormac (2011) on teacher education and teacher employment in Scotland. The decision to discontinue the CT scheme after a relatively short time may be considered surprising, given the high regard accorded the initiative when it was introduced. It was described as:

> "one *of the most significant changes to the career structure for teachers for many decades*" (Audit Commission (Scotland), 2006a, para. 17)

Only 25% of 3,387 respondents to McCormac's "*call for evidence*" in his report agreed that the CT scheme should be disbanded; 37% thought that it should be retained and amended to help address issues associated with it and 38% thought it should be retained in its then, current form. Arguably, this might raise the question of the recognition the authorities place on "rewarding" accomplished teachers who remain in the classroom and also the confidence teachers might have in policy-makers who back-track on what might be a very important development for some. It might also bring in to question the value placed on the alleged new consensus and more open, inclusive consultation process, advocated by the Scottish Government.

3.7   Early review of A Teaching Profession for the 21st Century

Evaluations of the Agreement are reviewed for purposes of comparison with the survey data collected in the current study. A nationwide survey, "*A Mid Term Report: a first stage review of the cost and implementation of A Teaching Profession for the 21st Century*" (Pollock et al, 2005), was commissioned by Audit Scotland. In conjunction with other measures, Audit Scotland commissioned a telephone survey of all 32 local authorities to seek their views on the successful implementation of The McCrone Agreement.   Fourteen local authorities agreed to participate, from which 507 headteachers, 1,411 teachers and 2,582 support staff replied. The study examined the cost of implementation; measurable outputs so far achieved with the funding; value for money; and whether changes brought about by the Agreement made teaching a more attractive career.

The Report concluded that the Agreement had been of benefit to teachers and had led to improvements for the profession. The evidence gathered indicated that the recommendation of 35 hours of CPD had been put in place across Scotland; 93% of those teachers surveyed stated they had a CPD plan and 96% said they maintained an individual CPD portfolio. Although the report stated that teachers in general were satisfied with the provision and content of CPD opportunities and activities, about 25 – 30% of respondents did voice some concerns about the amount of time available to them to participate in courses and the convenience of the times at which the courses were held (p.25).

With regard to the uptake of SCT, results showed that far fewer teachers than had been assumed were participating in the scheme. Of the expected £8m estimated cost earmarked for the scheme, at the time of the Audit Scotland report only £4.1m had been used, suggesting that at that time CT was not an attractive prospect for teachers. When questioned on what made teaching a more attractive profession since the McCrone Agreement, the CT scheme did not feature prominently. The main reasons that classroom teachers gave as likely to influence their decision to participate in the scheme were: *to further their career opportunities (39%); to further develop their teaching skills (39%); for the additional salary* (38%*).* Results indicated that teachers who had been in the profession longer were considerably less likely to participate in the scheme than newer entrants to the profession. The percentage of those likely to take part in the scheme dropped from 40% among those who have been teaching for three to ten years, to 15% among those in the profession between 11-20 years, down to 3% of those who have been teaching for 21 years or more. The group, i.e. experienced teachers, at whom the scheme was aimed, appeared to be the group least interested. The Report recommended that given the enhanced investment in CPD, local authorities and the Scottish Executive should put in place effective monitoring and evaluation schemes to asses the value of the investment in CPD on teaching and learning. Also given the additional cost associated with the CT scheme, there was a need to ensure that CTs were used to best effect in schools.

In March 2006, North Lanarkshire Council (NLC) Joint Negotiating Committee for Teachers carried out a survey to establish (a) to what extent and (b) how successfully the recommendations in the McCrone Agreement had been implemented in schools

in North Lanarkshire (North Lanarkshire Council, 2006). The survey was constructed in 3 parts. Part A of the survey was linked to each paragraph of the Agreement. The survey had a high return rate; 80% (104 out of 130) primary schools, 88% (23 out of 26) secondary schools and 64% (7 out of 11) special schools returned the questionnaire. The questionnaire was not completed by individual teachers, but by the schools' Staff Representative Group after staff discussions. This may account for the very high response rate. The NLC survey suggested that in North Lanarkshire, the Mc Crone Agreement had been implemented in full and with a high degree of success. However, the report stated that the lowest rated item by both primary and secondary teachers was the route to CT where the majority of comments indicated that the costs of the programme were prohibitive and some respondents felt there was not enough information available on the process. McGeer (2009) suggests that costs may be a genuine barrier to some teachers participating in the scheme, but that there may be other reasons for the low uptake, such as time commitment. He also argued that the "*perceived requirement to prove excellence*" might be daunting for many teachers (*ibid.* p.9).

An investigation into the McCrone Agreement undertaken by HMIE, *Teaching Scotland's Children* (HMIE, 2007) shared the same general conclusions as those voiced above. Not unreasonably given their role, HMIE noted the absence of any success criteria for assessing the effectiveness of recommendations in the Agreement. They specifically criticised the lack of detail on how any of the new structures might impact on the quality of curriculum and learning in schools. The report concluded that at that time, the impact of the Agreement was very limited and

that few teachers thought the route of CT would provide them with a sense of accomplishment; although HMIE suggested that local authorities appeared to value the potential contribution that CTs could make.

Further literature linked to SCT is an unpublished thesis which investigated implications for teachers, Chartered Teachers and their managers following collaborative professional enquiry (Fox, 2009). Using a case study method, Fox investigated the experiences of four aspiring Chartered Teachers and their colleagues in two educational settings, one primary and one secondary while the CTs attempted to lead, implement and evaluate a programme of collaborative professional enquiry undertaken with their colleagues. Fox found that the nature of leadership as carried out by the CTs appeared to be problematic for everyone involved. The conclusions of her inquiry stated that while the CTs appeared happy to lead the projects and the teachers appeared happy to let them do so, the school managers were less enthusiastic about allowing it to happen. The ultimate decisions were taken by the headteachers who it appeared were unable to stand back from the projects. This left the CTs with feelings of ambiguity and uncertainty which were confirmed by the head teachers' feelings that there were still issues surrounding the actual role of CTs and how they could be used in schools.

3.8 Curriculum for Excellence

Curriculum for Excellence (CfE) was introduced in 2004, which was too recent for the initiative to be included in the original research. Since it was fully implemented in 2010, a brief synopsis has been added to include it now.

CfE is a major curricular change which replaced the "*constraining effects of 5 – 14*

(Bryce and Humes, 2008, p. 5) and established a set of principles for the whole

curriculum from age 3 to 18. It has been widely acknowledged as the most

significant educational development in a generation, with the potential to transform

learning and teaching in Scottish schools. CfE seeks to re-engage teachers with

processes of curriculum development, to place learning at the heart of the curriculum

and to change deep-seated practices of schooling.

An expressed aim of CfE is to give teachers more freedom in selecting curriculum

content and encourage fresh forms of pedagogy, presenting teachers with more

freedom and control of the curriculum. The ideology of CfE is linked to keeping

learners at the centre and building the curriculum around the development of four

capacities i.e. successful learners, confident individuals, responsible citizens and

effective contributors; to transform the learning experience of young people, link

directly to the national Skills Strategy and contribute to economic, cultural and social

regeneration.

3.9   Summary

This chapter has attempted to outline the education initiatives launched by the new

Scottish Parliament and provide a brief overview of the rationale and structure

behind policies introduced with the aim of raising standards in Scottish schools,

highlighting the new policy style based on consensus and wider consultation

processes characterised by the Scottish Government. The Standards in Scotland's

Schools etc, (Scotland) Act set the foundation for future development through the

National Priorities for Education and arguably the most influential policies, A

Teaching Profession for the 21st Century (The McCrone Agreement) and Curriculum

for Excellence. In addition to the pay and conditions of service for teachers

introduced by the McCrone Agreement was a greater emphasis on CPD evidenced by

the recommendation of additional hours of CPD for teachers.

As can be seen from the literature above, this has continued a long-standing debate

on the quality of teacher education and the question of professionalism in teaching.

In the Agreement, the altered career structure for teachers, resulting from the

introduction of the SCT, was seen as pivotal for career advancement for experienced

teachers who wished to remain in the classroom. The general discussion and

evaluations of these two aspects of the McCrone Agreement have raised questions

regarding the impact of their implementation in terms of cost and of pupil learning.

Given the aims of this study and suggestions made by Wilson (2002, in section 3.2.2)

regarding additional workload issues, I consider that CPD and CT status are areas

that should be investigated in terms of any impact they might be having on additional

pressure for teachers.

The focus of the next chapter is the concept of occupational stress and contains

studies related to stress in teaching examined prior to the empirical research and at

the gaps in the literature.

Chapter 4   Literature Review of Workplace Stress

4.1   Overview

The aim of this study was to establish perceived evidence of stress in teachers, and whether it was related to pressure from new education policies introduced since the year 2000, or to factors intrinsic to teaching. The previous chapters outlined the context in which the study is set, detailing policy innovation which many teachers still currently working in schools have experienced over the past 30 years or so. This outline presented a general framework for a more focused discussion on the causes and effects of stress in the workplace.

The literature search therefore, aimed to provide an understanding of the concept of stress and empirical examples of occupational stress in teaching in relation to change and other factors. The chapter begins with a brief overview of a number of theoretical perspectives that have led the empirical inquiry in the general area of occupational stress. It examines some conceptual and methodological issues that are relevant to the study of job stress and health before concluding with evidence of stress specific to the teaching profession. Prominent stress researchers such as Guglielmi and Tatrow (1998) and Lazarus (1999) recommend that stress be viewed as an interactive relationship between the person and the environment. This complex relationship requires that stress researchers employ more holistic process methods, a fact that influenced the qualitative methods (although restricted) adopted in this study.

The following questions guided the search of the literature:

- What is stress?

- How prevalent is stress in the workplace and specifically how widespread is it in teaching?

- What are the main reported causes of stress for teachers?

- What are the effects of stress?

- What does the literature reveal about teacher stress in Scotland?

4.1.1 **How the literature review was conducted**

Various sources and databases were searched for literature relevant to conceptual models of stress, the prevalence of stress in the workplace and in the teaching profession and sources of stress in teaching. Evidence was obtained from the databases ERIC (Educational Resources Information Centre) and Google Scholar. Many professional journals, inter alia the *British Journal for Educational Research* and principally, the *British Journal of Educational Psychology, Journal of Educational Studies, and Journal of Occupational Psychology* presented ongoing research and papers related to the literature search; the majority of these were accessed online or through the University library via the Shibboleth process. The library also provided a number of useful books, particularly Vandenberghe & Huberman (1999); Guglielmi and Tatrow (1998); Travers and Cooper (1993). As the search progressed it became evident that there was a lack of literature relating specifically to studies in Scotland with the exception of a few undertaken on behalf of the Scottish Centre for Research in Education (SCRE). This review therefore draws heavily on UK and worldwide studies to identify relevant factors related to workplace stress. Keywords used in the search were: "occupational / workplace

stress", "cause / effects of stress", "teaching", "policy" and "Scottish". The initial

search began in 2005 and was confined to studies undertaken in the previous 10 - 15

years unless they were considered to be of particular relevance to this study. Criteria

for inclusion were empirical studies, or reviews of empirical studies on occupational

stress and that the population must contain a sample of teachers, working in schools

or other educational establishments. The search for newly published work continued

until the submission of the thesis.

4.2 Literature search prior to the empirical study

4.2.1 Conceptual aspects

Stress is viewed as a central aspect in human behaviour as the concept has gradually

become acknowledged in most forms of discourse about life and health. In the

modern world it has become a universal explanation for human behaviour in

industrial society (Viner, 1999). In the 1960s, alongside advanced technological

developments with life-changing possibilities came promises of increased leisure

time and a 20-hour working week. Throughout much of the developed world the

1970s were plagued by periods of industrial conflict followed by the "enterprise

culture" of the 1980s resulting in a decade of privatisation, new business start-up

initiatives, joint ventures and process re-engineering `*transforming workplaces into

free-market, hothouse cultures´* (Cooper, Dewe, O' Driscoll, (2001. p. *xi*). It was

during this period of entrepreneurial development and economic competitiveness in

international markets that the concepts of "stress" and "burnout" in the workplace

first appeared in educational literature (Vandenberghe & Huberman, 1999).

During a period of continued recession at the end of the 1980s and into the 1990s, there was a move towards the privatisation of the public sector and advances in information technology that provided the potential for the most profound changes in the workplace since the industrial revolution (Cooper et al, 2001). In the early 1990s, many organisations downsized and restructured the workforce in an attempt to deflect the effects of the recession taking place in the UK at that time. The rapid expansion of information technology added to information overload and an accelerated pace of work. The British Institute of Management survey (Worrall and Cooper, 1999) revealed that at the end of the 1990s

> *"organisations were in a state of constant change, with over 60% of this national sample of managers having undergone a major restructuring over the previous 12 months……these changes led directly to increased job insecurity, lowered morale and the erosion of motivation and loyalty".*

(Cooper et al, 2001 p. xii).

4.2.2 Early definitions of stress

Much of the research on stress begins by highlighting the complications related to and the confusion surrounding the way in which the term stress has been used (Cox, 1993; Guglielmi & Tatrow, 1998; Cooper et al., 2001; Wilson, 2002). Reviews of literature on stress suggest several different, but overlapping approaches to the definition and study of stress (Johnstone 1989; Boyle, Borg, Falzon, & Baglioni, 1995; Guglielmi & Tatrow, 1998; Rudrow, 1999; Cooper et al., 2001; Carlyle & Woods, 2002). This chapter briefly outlines and critically assesses three conceptual models.

First, the response-based approach to the study of stress pioneered by Hans Selye in the 1930s and 1940s viewed stress as a dependent variable. Thus defined, stress is seen as a neutral, physiological phenomenon; a non-specific response of the body to any demand made upon it, either positive or negative, for example in "fight or flight" syndrome (Johnstone, 1989; Dunham, 1992; Cox, 1993; Boyle et al., 1995; Viner,1999). This model has its limitations in research into stress in the workplace, particularly in this study, since for practical reasons the measurement of physiological response to stimulus is more suited to laboratory testing. A further weakness of the model is that there may be other manifestations of stress which are not emotional or psychosomatic, such as ineffectiveness in performance or loss of confidence.

Second, the engineering model defined occupational stress as negative environmental factors or stressors associated with a particular job. The theory behind this model, which again regarded stress as an independent variable, views stress as the load or demand put upon a person until their capacity to deal with the demand is exceeded to an extent, where psychological or physiological damage occurs (Dunham, 1992; Cox, 1993). However, when applying this model it may be difficult to separate pressures on an individual which are work based and pressures from other sources (Dunham, 1992). Both of these models of stress are considered to be conceptually dated, since they are set within a basic stimulus – response theory and do not take account of the diversity of psychological nature, experience and cognitive processes. The individual is viewed in a passive role; the interaction between person and

63

environment is overlooked, eliminating the psychosocial and organisational contexts to work stress (Sutherland and Cooper, 1990; Cox, 1993).

The third model, defined as the psychological or interactional approach and the model adopted by many researchers including Johnstone (1993), Cox, Kuk and Leiter (1993), Guglielmi and Tatrow (1998), and Wilson (2002), views stress in terms of the interaction between a person and the work environment. Wilson (2002) suggests that particular situations for teachers in these terms might be during the probationary year, working with pupils with special educational needs or as in this study, working in areas of multiple deprivation, "*which may give rise to demands beyond their(teachers') adaptive limits*" (p. 5).

When applied to occupational stress, the components of this three-way transactional model are the work environment (e.g. workload, interpersonal and organisational difficulties, lack of resources, lack of autonomy and of decision latitude and physical stressors such as noise or crowding); the person (e.g. individual characteristics including personality, coping resources, perceptions and appraisals, gender, homelife and genetic traits); and the physical, mental and behavioural exhibits of stress (e.g. physiological dysfunction - cardiovascular changes and generally "stress-related" symptoms and illnesses; psychological dysfunction - depression and anxiety; and behavioural dysfunction - smoking, drinking, absenteeism and unhealthy eating habits) (Guglielmi & Tatrow, 1998, p.62). A weakness of the current study is that it mostly measured only the interaction with the work environment. Measurements of alternative factors (person and physical) were either outwith the capability of the

researcher or were considered, ethically, to be too intrusive to investigate in a doctoral study such as this. The exception was the information gathered from nine respondents in the group interviews, discussed in sections 5.8, 5.9.2 and 6.3.

4.2.3 Outline of transactional models of stress

Motivated by the plethora of literature on the negative physical effects of teacher stress and burnout and the lack of published reviews of this work at the time, Guglielmi and Tatrow (1998) set out to provide the first comprehensive critical review of existing literature on the relationship between teacher stress and burnout, and adverse health outcomes. Much of the remaining content of this section in the chapter refers to their findings. Several of the theoretical models of occupational stress outlined below have adopted an interactional perspective.

The *person-environment fit model*, developed in the 1970s at the University of Michigan, views stress as the result of the psychological state that is, or is represented as, the misfit between workers' perceptions of the demands on them and their ability to cope with those demands (Cox et al., 1993). Individual differences in perceptions, skills and tolerance for job pressures are among the key modifiers of the stress-strain relationship.

The *demand-control model* predicts that the most adverse health effects of psychological strain occur when job demands are high and the opportunity to make decisions is low. The 2x2 table that results from this combination allows specific predictions about which work conditions will result in the least, and in the most,

strain. The high demands associated with prestigious jobs e.g. corporate executive, are mitigated by the great deal of control that also characterises those jobs. An important point in relation to this model is that it does not take into account individual characteristics as contributing to stress. Decision latitude and control are seen as characteristics of the job itself, not of the individual (Guglielmi and Tatrow, p.62).

A further example of an interactional model is the *effort-reward model* developed by Siegrist (Guglielmi and Tarrow, 1998), which assumes that emotional distress and adverse health symptoms occur when there is a perceived imbalance between efforts and occupational rewards. Unlike the previous model however, the focus on a need for control and personal coping patterns calls attention to the role of individual characteristics in modifying the stress-strain relationship.

One further model outlined is the *demands-supports-constraints model,* which Guglielmi and Tatrow suggest is an amplification of the basic demand-control model. In this instance, lack of decision latitude is only one of the many possible factors that may limit and constrain the worker. Constraint, coupled with lack of support and resources in the context of high demands, leads to strain

Stress is not always viewed in a negative light as can be seen from the *effort-distress model.* Within this model, the great deal of effort needed for highly demanding jobs does not inevitably result in strain. Lundberg and Frankenhaeuser (1984, cited in Guglielmi and Tatrow, 1989) found that the presence or absence of cortisol levels

harmful for health was dependent on whether the experience of stress was considered by the individual to be within or outwith their ability to cope with the situation. However, the answer to the question "what is stress" asked of a small number of respondents (sections 1.4 and 6.3) revealed a negative connotation with the concept of stress.

4.2.4   Evaluation of the models

Guglielmi and Tatrow (*ibid.* p. 63) claim that of the theoretical perspectives outlined, the demand-control model is the one which has generated the greatest amount of research and is the one considered to be the dominant theoretical perspective in the study of occupational stress. They claim that this model allows specific predictions about which particular aspect of the work environment result in strain and which occupations are most vulnerable. Investigations have produced a large body of work with data from large-scale studies using a variety of research designs (i.e., cross-sectional, cohort and case-control studies) suggesting the strong predictive power of the model (Karasek & Theorell, 1990; Kristensen, 1995; Schnall, Landsbergis & Baker, 1994; Theorell & Karasek, 1996), (cited in Guglielmi and Tatrow (*op.cit.* p.64).

Although the vast majority of these studies have examined the effects of job strain on cardiovascular morbidity and mortality, the interaction of high demand and low decision latitude has been found to be a factor for a long list of illnesses. It is argued that the success of this model might be expected since the issue of control has been well researched in health psychology and there is much empirical evidence to show

that control is an important factor in moderating the effects of stress (Weiss, 1968, 1972; Glass and Singer, 1972).

4.2.5   Methodological and conceptual considerations

Guglielmi and Tarrow (*op. cit)* and Wilson (2002) postulate that in the area of stress research, there is no consensus on what *stress* is. The term holds different meanings for different people and there is no generally accepted operationalisation of this construct. The lack of a universal conceptualisation in the study of stress has resulted in measurement strategies that lack consistency across investigations resulting in "*a literature that suffers from widespread terminological and conceptual confusion*" (Guglielmi and Tatrow *op.cit*. p.69). This is a problem generally associated with studies on occupational stress and is a particular difficulty in studies related to teacher stress, where researchers have constructed measures that are applicable to their own investigation and as such the psychometric properties are not discussed by the authors and remain unknown. Guglielmi and Tatrow (*ibid.*) refer to the measures used in these contexts as "homegrown".

One of the axioms of occupational stress generally, and in particular of teacher stress, which is not always taken into account, is the importance of individual characteristics when investigating the relationship between stress and illness. All behaviours and psychological processes result from the interaction between individuals and situational variables, thus stress is a process in which the appraisal of, and coping with, work demands, play a major role; personality characteristics as well as organisational factors and daily activity have an influence on this process (Rudrow,

1999). Guglielmi and Tatrow argue that many empirical studies fail to take cognisance of this multivariate perspective and focus instead on stressor-illness correlations. They do acknowledge however, that more recent researchers of occupational stress are beginning to consider the effects of possible stressor-modifier interaction in their studies.

A second important variable that has received relatively little notice is gender. Guglielmi and Tatrow's (*op.cit*) review identified research that showed that the predictive power of the demand-control model is ineffective when the study sample consists of women (Johnson and Hall, 1996); and significant associations between work stress and blood pressure have been found for men, but not for women. Guglielmi and Tatrow concur with the original research that given the high numbers of women employed in teaching, the role of gender would be an appropriate variable to consider in investigations of teacher stress and strain.

Guglielmi and Tatrow consider that "type of teacher" is one further variable that potentially is an important modifier of the relationship between job stress and health in teachers. They cite the work of Kristensen (1996) in reviewing some of the empirical evidence on the issue of within-occupation variance, and claim that one should not assume that each individual teacher will experience the same amount of stress and strain, especially if the study population consists of a mixed sample of teachers. The job of teaching is not standarised, but presents different challenges, demands and rewards, depending on the geographical location of the school, the age

group and capability of pupils, and the socio-economic environment within which the school is situated.

In more recent research, Wilson (2002), commissioned to review the literature of research on teacher stress, concurred that the main difficulty in measuring teacher stress levels is the reliance on self-report inventories which are unsupported by medical tests or observational evidence. She suggested triangulating the self-reports with sickness and absence rates or blood pressure levels; or monitoring whether changes in "stressors" such as a particular class, pupil or parent, corresponds with changes in physiological conditions. She does suspect however, that teachers would consider such studies intrusive and refuse to take part.

4.2.6 The prevalence of stress in the teaching profession

I highlight the work of Dunham (1992) and others in the early 1990s as it is relevant for my research through similarities in the contextual background to the research. Throughout the last three decades of the 20th century teachers were affected by major changes taking place in education (see section 2.2). Schools faced the demands of reorganisation, the raising of the school leaving age to 16 and the development of new schemes of work. Teachers were put under pressure to adopt new methods of self assessment and were expected to maintain high professional standards while financial support for schools was reduced and there was less recognition of their efforts (Woods, 1999).

Dunham (1992) highlighted the expansion of education services in the form of comprehensive schools as the cause of particular anxiety for teachers. Some teachers confided that they experienced feelings of apprehension and insecurity at the thought of changing to a larger and more complex school, the possibility of more pupil indiscipline and adapting to major organisational and curricular changes. Dunham (*ibid*) reported claims by teachers that their work was being regulated by the four-item framework of the National Curriculum: profile components, attainment targets, levels of attainment and statements of attainment. Teachers were learning to use new terminology and new ways of curriculum planning, assessment and record keeping, which arguably raised issues of prioritising time. Dunham (1992) stated that teachers, who attended his stress management workshops alleged that the many different types of changes imposed on them because of the Reform Act 1988, were a source of extreme pressure.

These changes included coping with Local Management of Schools; the National Curriculum; lack of time for planning and discussion to implement change. The time required for all of these reforms could not be lengthened because of the fixed number of hours specified in each teacher's contract. He construed that during the school day, time could be appropriated from activities seen as non-essential in the National Curriculum. However, when time needed to be appropriated outside of school, it was more likely that time would be taken from that usually spent with family, on exercise, relaxation or sleeping. Dunham (p.21) reported the concerns voiced by members of school management:

> *"The major pressures are the increasing complexity and accountability of the job, e.g. coping with the Local Management of Schools, the National*

> *Curriculum etc. There is a lack of time for planning in order to prepare for their implementation".*

He commented also on demotivating factors expressed by some teachers:

> "*Besides the very nature of teaching in Britain, legislative changes to education have greatly contributed to stress in the teaching profession. Many of the changes brought about have turned out to be very positive and yet the sheer powerlessness felt by British teachers has been such that many have rejected all changes altogether and asked for early retirement or left the profession or unfortunately broken down*" (p.28).

This viewpoint is supported in research by Travers and Cooper (1993), who reported that the primary sources of job pressure for teachers were associated with change and included: lack of support from central government; constant changes within the profession; lack of information as how to implement changes; diminishing social respect for teaching and the move towards a national curriculum.

Travers' and Cooper's (1993) study of mental health, job satisfaction and occupational stress among UK teachers, has elements similar to my own research, partly in terms of the purpose and in terms of the timing of their research, which was undertaken shortly after the implementation of major education reform i.e. the Education Reform Act 1988. Travers and Cooper (1993) were commissioned by the NASUWT to investigate the extent and source of teachers' stress throughout England, Wales, Scotland and Northern Ireland. The large-scale investigation aimed to provide current data on the specific nature of pressures in teaching and the cost of these as measured by stress outcomes; and to examine the relative importance of contemporary factors such as change and new policies, as well as factors deemed intrinsic to teaching, for example, pupil behaviour and inter-personal relationships with colleagues.

A further reason for interest in teacher stress at that time was that it allegedly (Hughes, 1990) contributed to an increase in absenteeism and early retirement. Travers and Cooper posited that previous research had failed to properly identify the particular factors that were most likely to result in stress and claimed this was partially due to a lack of studies with a sufficiently large cross-sectional sample, examining subgroups by using the same measure. Their study aimed to fill the gap by: examining a large cross-sectional sample of teachers throughout the UK; using the same survey instrument to measure sources of pressure and stress outcomes for all types and levels of teachers; investigating the effects of intrinsic and contemporary stressors involved in teaching, with the purpose of highlighting which features of a teacher's job were likely to cause them stress.

Two types of measurement were used to collect data, both qualitative and quantitative. An important outcome from their study originated from the first qualitative measure in the form of a "sources of job pressure" item bank. This was developed from data gathered from semi-structured interviews with 40 teaching staff from a cross-section of schools in the north-west of England. It provided a rich source of information in terms of revealing the pressures felt by teachers, from which, following simple content analysis, the item bank was created. The second, quantitative measure, an in-depth questionnaire, was administered as a postal survey and sent to a sample of 5000 teachers within schools and colleges nationwide, with a response rate of 36% (n=1790) , a standard size for a postal survey. The distribution of "teacher type" was representative of the union membership from which it came.

The questionnaire was divided into six sections. The first four sections contained independent stressor measures, namely, demographic measures regarding the respondents' personal biographical items and job demographics related to their career; a measure of behavioural style i.e. the type A questionnaire; a coping inventory; and a sources of job pressure measure. The last two sections of the questionnaire contained independent or "strain" measures composed of mental health and job satisfaction. Additional dependent variables were also obtained on health-related behaviours (e.g. smoking and drinking) and on intention to leave the profession. Evidence of measures of reliability and validity values and analyses are given for all dependent and independent variables, and can be viewed in the original research paper. My focus will be on the findings of job-related sources of pressure since that is what is relevant to my study. A list of the top 10 sources of pressure found by Travers and Cooper is presented in Appendix 6.

Given the timing of the research, the authors were unsurprised that teachers named lack of government support, lack of information about changes, constant change in terms of their pace, and implementation (e.g. the national curriculum) as among their greatest sources of stress. This view was paralleled by observations made in Scotland at the time, which aimed criticism at the authorities: "*one of the greatest pressures felt by all school staff was the time scale set for the implementation of the 5 – 14*" (Malcolm and Schlapp, 1997 (in section 2.4)*.* Travers and Cooper found that teachers experienced pressure from their "lack of status" and respect from society as a whole and that a lack of promotion opportunities were causing job dissatisfaction, especially for women teachers. These findings highlighted the importance for

teachers to have control over their own work environment, status in their jobs, and reward from others in the form of recognition for work well done, as well as effective CPD needed to carry out the changes. Similar issues were raised later in the decade in a Scottish parliamentary white paper (section 3.1). The study further revealed that intrinsic job factors such as pupils' behavioural problems, workload in the form of a lack of non-contact time and the need for pupil assessment also caused pressure.

Significant differences were found between the genders in terms of job pressures. Female teachers reported considerably higher levels of pressure than male teachers from: 'management and structure of the school'; 'overcrowding in school'; 'appraisal of teachers', and 'job insecurity'. Although the assumption could not be made today as teaching continues to be an increasingly feminised profession (Matheson, 2007), the authors considered that male teachers in the sample were more likely to be in managerial positions; therefore, it was not surprising that they were reporting significantly greater pressure from managerial concerns than female teachers.

Some significant subsample differences were also found in relation to teaching area, for example, inner-city teachers were reporting higher levels of pressure from 'pupil / teacher interaction' and 'cover and staff shortages' than other areas. School sector was found to be a determining factor in experiencing pressure, with primary teachers reporting notably higher levels of pressure with 'class sizes / overcrowding' and 'appraisal of teachers'. Secondary teachers on the other hand, reported significantly higher levels of pressure with 'pupil behaviour', 'management / structure of the

school' and 'cover / staff shortages'. Teaching grade was also found to affect the type of pressure felt, in that mainscale teachers reported the highest levels of pressure with 'pupil behaviour', 'management / structure of the school', 'teacher appraisal', 'lack of status / promotion' and 'job insecurity' with deputy heads reporting higher levels of pressure from 'class sizes / overcrowding' and 'ambiguity of their role'. Female respondents reported a significantly higher level of job satisfaction than males on all aspects apart from "working conditions"; and teachers in primary schools reported higher job satisfaction levels than those working in secondary schools. Across the whole sample, the factors which were predictive of dissatisfaction with the job of teaching were poor management / structure, poor promotional chances and lack of status. Only "job pressure factors" were predictors, not demographics or personality variables.

Of the teachers in the sample, 66.4% *(n = 1181)* had actively considered leaving teaching in the 5 years prior to the study; 27.6% *(n = 456)* were currently seeking alternative employment, and 13.3'%, *(n = 181)* were seeking early retirement. The study found that "intention to leave" was mainly determined by the state of the teacher's mental ill-health and importantly, the findings indicated that older teachers were at risk, as were those who exhibited type A behaviour and those with poorer coping strategies. The authors concluded that the major educational changes that had taken place in the preceding years were reported as being a major source of pressure for teachers, leading to job-related pressure, role ambiguity and conflict.

Interestingly, although change was seen to be very high on the list of top stressors, the factor measuring change was not in itself a predictor of the presence of stress. The major overall finding from this research was a need to improve policy on change. Teachers were unhappy with recent changes, although this was not so much due to the changes themselves, but more with the actual *process* of the introduction of the changes. Travers and Cooper suggested that more consideration should be given to the 'end-user' in the process; in this case the teacher. The pace and extent of change was seen to be a major source of stress for a large majority of the teachers in the sample. Teachers were not opposed to change as such, but the way the changes had been implemented was a major source of stress, and their ability to cope had been exceedingly strained. The authors recommended, inter alia, that innovative ideas should be thoroughly tested and objectively validated before being imposed on schools, teachers and pupils; they should only be introduced at the same rate as existing practices are disregarded (i.e. if they are improvements, they should replace, not augment current practice).

Another 'structural / organizational' intervention concerned the management of schools, as poor management and structure was the main cause of very low levels of job satisfaction among teachers. This suggested that alongside changes in ideals, there was a need for change within the structure of the schools themselves. Not only did head teachers therefore need better training to deal with their added responsibilities, but so too did other members of the school, so that they might adjust to their changing roles. Although not discussed here, Travers and Cooper took a multivariate perspective by including a measure of behavioural style and a coping

styles inventory in their study, which in the view of Guglielmi and Tatrow, above (section 4.2.5), gives credence to their findings.

Despite the above evidence, Dunham (1992) found that some teachers viewed the changes as a positive move. These teachers embraced the challenge of new methods of teaching, enjoyed being part of a larger establishment and saw opportunities for promotion.

> *"Teachers know what is expected of them from the clearly defined national curriculum ….and the precise objectives carefully identified in the attainment targets and statements of attainment"*
>
> (*ibid*. p.24)

Although the issue of work related stress and in particular, teacher stress, is perceived as becoming increasingly problematic (Cooper & Payne, 1991; Rudrow, 1999; Smylie, 1999; Vandenberghe & Huberman, 1999, Wilson, 2002; Kyriacou & Chien, 2004), Woods (1999) conversely, highlighted studies for example, Pithers and Fogarty (1995) who reported that there were as many, if not more, teachers who were still highly motivated and did not suffer from stress. Woods (1999) cited Lens and Schops (1991) who reported that in a survey of 718 junior high and high school teachers in Flanders, 41% responded that they were very seldom stressed by their job and 12% responded that they were never stressed; a large majority 67% were rather or very satisfied with their jobs and only 17% were rather or very dissatisfied. Several research findings (Smylie, 1999; Selye, 1974; Dunham, 1992; Malcolm and Wilson, 2000) acknowledge the possibility that stress may have positive outcomes; however in the majority of research, stress has acquired a negative connotation, implying excessive demand or pressure for workers. The findings of Borg and

Falzon (1989) and Pithers and Sodden (1998) showed that in Western and Eastern countries, 60% - &0% of the teaching population consistently exhibited symptoms of stress.

4.2.7 Workload and overload

This section will focus on workload, a source of teacher stress that has become increasingly important in recent years due to litigation cases of teachers claiming to be forced to work excessive hours leading to stress (Travers, 2001). Analysis of calls to Teacher Support Line shows that for 27% of callers, the most common concerns are stress, anxiety and depression. Reasons given for these negative factors are: workload, "*being overwhelmed by new initiatives*" and "*working all hours*".

A cross-national comparison study by Travers and Cooper in 1996 involving a survey of 800 teachers in England and France, showed substantially different responses between the two groups in certain areas, for example 22% of sick leave in England as opposed to 1% in France was attributed to stress and 55% of the English teachers compared to 20% of the French sample reported having recently thought of leaving teaching. There was considerable consensus of opinion between the English and French teachers with both groups agreeing that classroom discipline, low social status and lack of parental support were major sources of pressure. English teachers however reported more problems with long hours, overwork and political interference.

Work overload is not confined to teaching in schools. Two years after the Travers and Cooper study, Male and May (1998) studied a group of learning support coordinators in a Further Education College. Thirty-five were assessed for burnout, stress and health. Although the study showed mixed evidence for heightened stress, there was strong evidence of work overload and excessive hours associated with emotional exhaustion.

Workload may however be dependent on the time of year. Some research has identified a cyclical pattern in the effects of overwork related to the academic year. Kinnunen and Leskinen (1998) investigated levels of stress in 142 teachers by repeated self-report during the autumn and spring terms. The researchers found that recovery from stress occurred each weekend during the spring term of an academic year, but by the end of the longer autumn term, weekend recovery no longer took place. A US study by Fleishut (1985), reported by Travers (2001), examined stress patterns in 81 teachers working in elementary schools over a 12 month period and revealed that stress increased during the first part of the school year from September to November and decreased after the Christmas holidays, increasing steadily throughout March with another high point in May. The researchers suggested this pattern was due to an accumulation of stress throughout the term, for example, specific events such as assessment and parents' meetings. In a study which involved collecting blood samples and questionnaires from inner city London school teachers at the start and end of the autumn term, Travers and Cooper (1996) found that the blood samples showed low levels of cortisol which suggested chronic fatigue, even at the start of term.

4.2.8   Further factors that may cause teachers to be stressed

Kyriacou (1998) suggested that one of the main sources of stress for teachers may be the general level of awareness and watchfulness required of them; for example, the fact that teachers spend so much of their day in direct contact with pupils and the fact that they very rarely get a clear break for lunch. In a comprehensive study of teacher stress, job satisfaction and career commitment among 710 full time primary teachers in the islands of Malta and Gozo, Borg and Falzon (1989) found that workload and student misbehaviour were two underlying variables which emerged as significant predictors of teacher stress.

A further source of stress for teachers associated to change was the drive to improve standards. Wilson (2002) claimed there was some evidence that the school inspection system in England (there was no evidence of this in Scotland) greatly impacted on schools. Scanlon (1999) undertook a comparison of 451 schools which had been placed under special measures as a consequence of inspection, and 482 schools that had never been under special measures. Scanlon found that both samples experienced some form of "post-OFSTED blues". Around one-quarter of teachers and just under one-third of those from special measures schools experienced depression and despondency after the inspection. A high proportion in both samples reported feeling stressed during most of the year in which the inspection took place - 43% of teachers in special measures schools, and 32% of teachers not from special measures schools. The schools in both samples reported a parallel rise in sickness and time off work.

4.2.9   Scottish studies

Johnstone's (1993) research is relevant as it is one of the few studies carried out in Scottish schools plus the principal focus was teachers' workload and associated stress. The study sample was a good size (n=570) and had a return rate of 66%. The sample came from schools chosen at random in four Scottish regions and contained classroom teachers from all stages and subjects and promoted staff and managers from both primary and secondary schools. It therefore appeared representative of Scottish teachers and Scottish schools. The study was commissioned by the Educational Institute of Scotland (EIS) and arguably had the potential for bias since the EIS represented about 80% of the teaching profession in Scotland (Johnstone, 1993, p.7 -8); however, Johnstone stated that while the study sample had a slight bias towards union membership, union membership lists had not been used as a source for selection and non-members were also included.

Two measures were used to collect data. A workload diary asked respondents to record the work they had done over each day (using 15-minute blocks of time) during a specific week in September and to record for each day whether or not they had felt stressed during that day, and if so, to describe the cause of the stress, the symptoms and any help they sought or received. The respondents also completed an Occupational Stress Indicator (OSI), a widely used validated and normed measure used in industry and with other professional groups to give a more general stress profile. The return rate for this was 62%. Self-report measures are open to the criticism of presenting an ideal teaching self, but Johnstone considered that due to the length of the measures used, it was easier to report what actually happened rather

than manufacture a constant picture of an ideal working week. The questions related to stress were left open i.e. teachers were not replying to a pre-defined check list. They were therefore free to write as much or as little as they wanted, with the expectation that they would record what actually happened over the day.

Johnstone found that the respondents appeared by and large, settled and experienced people with reasonably positive views of their schools. The range of hours worked reported by teachers ran from the statutory 35 hours to a few teachers who recorded over 60 hours in the week surveyed. Teachers recorded a mean of 42.5 hours work during the week, which equated to a 6-day week. The mean working day over Monday to Friday was 7.89 hours, with an average of 3 hours worked at the weekend. Johnstone points out however, that, since the study took place in the mid week in September, near the start of the school year, it may be untypical of a "normal" week.

Analysis of tasks undertaken throughout the week revealed that administration in terms of paperwork took up about one fifth of senior management time in secondary schools and slightly less in primaries. Meetings took up about as much time as administration tasks in secondary and again slightly less in primary schools. For teachers in both primary and secondary schools, the main essentials of work were teaching, preparation for teaching and marking. About half of teachers thought that an extra five hours per week of their own time would be a reasonable amount to spend on preparation and planning; the self-report of estimated time actually spent on work tasks were for some, much higher. Ninety-three percent (n=531) reported at

least one stressful occasion during the survey week. Most people reported between

three and five occasions. The longer the hours worked, the more instances of stress

were reported. The connection between workload and feelings of stress appeared to

be real and not imagined, as those who felt their workload was unreasonable, did

work longer hours and did report more feelings of stress. The physical self-reported

symptoms of stress included headaches and stomach aches and the mental symptoms

included anger, anxiety and depression. The following quotations were selected by

the researchers as evidence of stressful workloads which were common to 71% ($n =$

405) of the sample who reported:

> "*..trying to implement 5 -14 targets when planning (it's) difficult because the method is still new and unfamiliar. (It) requires rethinking of methods and materials*".

> "*[it's] stressful when you are coping with the breadth of the present curriculum. [I] feel disappointed that I am not coping well with it, having taught since 1976*".

> "*.. too much time on forward plans instead of preparing work for actual lessons*".

> "*… increased demand for paperwork – a workplan demanded for every class, every term*".   Extra reporting and assessment is implied.

> "*..It's spending the evening planning for the next day after a physically tiring day working with the class*"

> "*…a meeting which involved identified additional administration – which has bee delegated to myself*".

> <div align="right">(p. 23).</div>

Primary school teachers attributed workload-induced stress to preparing materials to

teach multiple mixed-ability groups, plus the amount of paper work needed as

evidence of teaching and learning.   In secondary schools, preparation and marking,

keeping up with new demands and completing administration tasks led to repeated

workload stress. Forms and deadlines were particularly stressful combinations for both primary and secondary teachers. In a final open question in *Workload Diary* (response rate 62%, *n* =352) across all grades and sectors, workload was a major focus of concern. The most common issues for 40% of the sample who responded to this question were "*changes to the curriculum, particularly the 5 -14 Programme, allied to poor resources or lack of training for change*" and "*the increasing volume of paperwork demanded for planning and for administration*". These criticisms were aimed at general workload, not specific to the week of the survey. Pace of change and increasing demands were identified as particular issues.

From the responses to the open question on symptoms and coping strategies related to stress, about half of the signs reported were physical ones, such as headache or exhaustion. Over one third of signs were emotional feelings such as panic, depression or anxiety. There is little research on the effect of teacher stress on pupils, but the most commonly quoted emotional indicators of stress reported were anger, bad temper or impatience. Arguably, working long hours and feeling stressed could impinge on pupil / teacher interaction or relationships between staff, which might affect the ethos of a school.

Johnstone found that the OSI revealed that teachers were less satisfied than the general population with factors intrinsic to the job itself, the organisational structure or climate in which they worked and the home / work interface. Teachers were more satisfied with career and achievement in their job. They were more likely to cope with stress by using a social support network, but were also more likely to register

poor mental and physical health scores, more sleeplessness, headaches, or increased food, alcohol or cigarette consumption.

A point of note, since this research was carried out, the Scottish Government, following the recommendations in the McCrone Report, have implemented 2.5 hours per week of non-class contact time for teachers in an effort to achieve maximum working of 35 hours per week. Also, through the McCrone Agreement, there has been a major investment in support staff, introduced into classrooms to alleviate pressure from non-teaching working tasks. It will be interesting to see from the current study if these measures have helped to reduce workload pressure for teachers.

In July 2002, Valerie Wilson was commissioned by the Scottish Executive Education Department (SEED) to carry out a review of stress in teaching which updated the work carried out by Johnstone in 1993. I shall comment on this review in as much as it is relevant to Scottish schools. Wilson alluded to the large body of research into teachers' stress, but emphasised the point that very few examples of research on Scottish schools were found in her initial search of the British Education Index. Fourteen references were made to Scottish-based research, but few were included in her review since they were small-scale studies undertaken as part-fulfilment of a post-graduate degree in education at a Scottish university or because they were dated.

Of the two studies included in Wilson's review, one has been previously discussed above and the other, again commissioned by the EIS, SCRE (Hall, Wilson and Sawyer, 2000), repeated Johnstone's work, but with a much larger sample of 3000

union members who agreed to complete a workload diary. The surveys had similar findings. Teachers in the second (2000) survey reported working on average 42 hours per week and cited the main work items as teaching, preparation, planning and marking. However, although the reported hours of work had not actually increased, 93% believed their workload had increased recently. Teachers who had less than five years service, thought their working hours had increased in the past few years. Wilson posited that if this perception continued, it might impact on recruitment and retention in the profession. Wilson hinted at the potential issue of perception, associated with self-reporting in studies involving stress. The teachers in the second survey believed their workload had increased over the period, when in fact they continued to work the same number of hours as teachers had reported in 1993. The explanation may be related to the distribution of time to different job activities. Most of the respondents thought that they spent more time on preparation and planning (69%) and record keeping (83%) than they did previously.

Wilson's review also included a study of changes affecting teachers in the first cohort of candidates for the Scottish Qualification for Headship (Malcolm & Wilson, 2000). Some teachers in this study thought that studying for the qualification had impacted positively on their lives. These teachers reported that they "*reflect more often on the various skills", "have a more helpful framework within which to work*", and "*plan work in greater depth than before* (Wilson, 2002, p. 19). However, Wilson cautioned that these comments needed to be balanced by those of the majority who "*feel under greater stress than before the SQH*".

One further study included in Wilson's review, again from SCRE, showed the impact that 10 years or more of educational reform had had on teachers' stress. A study of all small primary schools in Scotland (n=893) undertaken between 1996 and 1998 (Wilson and McPake, 1998) identified the tension associated with the role of "teaching headteacher" during periods of multiple policy innovation. As in the workload survey by Hall et al, (2000) the headteachers of small schools perceived an increase in the pace of change. One headteacher reported (p.5):

> "*Although I agree with the philosophy [of 5 – 14]... there simply is not enough time to cover all the targets. TIME, TIME, TIME – there is not enough time in the day*"

4.2.10   The effects of stress

While data has not been gathered on the physical and psychological effects of stress on the respondents in this study (apart from the small number of teachers interviewed, sections 5.8, 5.9.2, 6.3), it is important to discuss the concerns due to the potential implications for the local authority and the government. Travers (2001) reported the key findings on observations of stress symptoms and responses to stress. She cited a Times Education Supplement (TES, 1997) report which claimed that the NASUWT claimed an increasing number of calls had been received at the end of the summer from teachers who could not face returning to school after the holidays. The teachers reported sleepless nights, depression and a breakdown in their relationships. In the years following the Reform Act 1988, Dunham (1992) investigated stress related to the seven major changes initiated by the Act. In his role as stress management consultant to various education institutions, he identified four main types of responses to stress: behavioural, emotional, mental and physical. Reported

behavioural reactions to stress included: heavy smoking, increased drinking, driving too fast and an inability to relax. Constant headaches, exhaustion, constriction around the windpipe and an inability to sleep were some of the physical symptoms described by teachers. Emotional response included depression and feelings of insecurity; while mental affects were reported as "*the general feeling that the workload is so heavy that it is impossible to cope*" (*ibid*. p.93). There are similarities between these findings and those by Travers and Cooper (1993) and Johnstone (1993).

In his review of research, Jarvis (2002) claimed the overall perception of teaching was that it had become a highly stressful occupation. In a survey of head teachers, commissioned by the National Association of Head Teachers, 40% of respondents stated they had visited the doctor with a stress-related illness in the previous year; 20% thought that they drank too much and 15% considered themselves to be alcoholics. In addition to health-related effects on individuals, Jarvis posited that stress impacted on teacher retention. He referred to a study conducted for the *Times Educational Supplement* in 1997 which found that 37% of vacancies in secondary schools and 19% of vacancies in primary schools were due to ill-health, compared with 9% of vacancies in nursing and 5% in banking and the pharmaceutical industry. He found evidence suggesting that the assumed image of teaching as a stressful occupation, was affecting recruitment in teaching. In a MORI poll of 2017 British adults conducted in April 2001, the perception was that teaching was a hard, poorly paid profession that was held in low public esteem. Graduates had significantly more negative impressions of teaching than non-graduates.

Wilson (2002) suggested that it is difficult to measure the effects of stress in areas not linked to the individual. Occupational stress in industry may be estimated in monetary terms related to the loss of production, but in teaching, loss is associated with a decline in the number of skilled teachers, impairment of teacher skills or in extreme cases, premature death. Wilson claimed the difficulty existed partly because the figures for teacher turnover are unclear and information has not been collected from teachers prior to retiral. There is little concrete evidence to suggest that stressed teachers are less effective teachers, although it has been argued that they disengage from the job of teaching, in which case, one may assume there is an impact on the interactions within the classroom. Dunham (1992) highlighted the "*cost to a positive attitude to teaching*" (p.25) quoting one teacher who reported "*I love my job. But for the last three months I have wanted to jack it in*". The teacher was responding to the pressure of implementing the National Curriculum Attainment Targets. She feared that she would be forced to abandon her "all-in" role, catering for the social, physical and emotional development of pupils in favour of their academic progress. As much of the research has focussed on teachers' feelings there is little evidence of how stress in teaching impacts on pupils and on their learning.

In her 2002 review, Wilson identified research (Holahan and Moos, 1985) which challenged the connection between stress in life and illness, suggesting that some people remain quite healthy although they experience high levels of stress in their lives. This view has highlighted the need for investigation into factors which mediate the impact of stress and the psychological resources teachers may use to keep stress within manageable levels. In contrast Troman (1998) claimed that

continuing to work through increased stress levels impacted greatly on teachers

personal lives. In a small-scale study of 24 teachers, he found that those reporting

high levels of stress had also experienced the break up of marriage or relationships or

were caring for dependant relatives or had experienced the death of someone close.

Arguably in these situations, it is difficult to establish whether work or personal-life

environment is the cause of the most stress.

Travers and Cooper (1993), Johnstone (1993) and Wilson (2002) concluded that

teachers believed their workload had increased and many researchers associated

increased workload with rising levels of stress.   However, Wilson believes there is a

lack of concrete evidence of its prevalence.

4.3   Summary of Key findings in section 4.2

The review set out to provide information on the following issues:

What is stress?

This chapter discussed some of the issues related to a study of occupational stress,

identifying several models used to define different conceptualisations of stress. The

extensive reports in books, journals and the media have revealed a wide range of

approaches and assortment of opinions, with very little in the way of consensus.

Stress was originally defined in the 1930s and 1940s as a non-specific response of

the body to any demand made of it, positive or negative. In more recent times it is

associated negatively with excessive demand or pressure. Three models of stress

were identified: the response-based approach; the engineering model and the

interactive model. Critics of the first two models consider them both to be conceptually dated, claiming that they are set within a basic stimulus – response theory and do not take account of the diversity of psychological nature, experience and cognitive processes. In contrast, the third model is viewed as a three-way transactional model whose components are the work environment; the person; and the physical, mental and behavioural exhibits of stress.

The chapter highlighted some methodological issues. In much of the research the measurement of teacher stress levels has relied heavily on self-reported information; problems result from the variation in the measures constructed for use in individual research; researchers often ignore the importance of individual characteristics in the process.

How prevalent is stress in the workplace and how widespread is it in teaching?
The volume of UK and international research presented in this review is testament to the fact that workplace stress is an extant phenomenon.   In 2000, the TUC urged the Health and Safety Executive to recognise that stress is a major workplace hazard. In addition, in 2001, a specific day was set aside as a National Stress Awareness Day during which stress-management events were planned to help people deal with stress in the workplace. The setting up of Teacher Support Scotland and the concern raised by the GTCS in 2001 in relation to areas of competence and ill-health, are clear indications that teacher ill-health, including stress, has become a worrying issue in the teaching profession however, some researchers question the reliability of measures used to collect data.

What are the main reported causes of stress for teachers?

The bulk of evidence gathered from several research projects acknowledged above, indicate that the main sources of stress reported from teachers are linked to: workload / overload; administration tasks and paperwork; long working hours; pupil indiscipline; changes in education policy; new methods of teaching and assessment; low social status; lack of parental support; poor management; accountability and school inspection.

What are the effects of stress?

There is substantial evidence, mainly from self-reports, that teachers suffer physical and psychological ill-health as a consequence of excessive stress. However, due to difficulties in measuring these features, there is a lack of statistical information on absence and retirals to substantiate the claims. Despite the widely reported feeling of teacher stress and associated problems, there has as yet been no investigation of whether these factors impact on pupil / teacher interactions or on pupils' learning experiences.

What does the literature reveal about teacher stress in Scotland?

The evidence from Scotland supports my claim that there has been very little acknowledgement of the potential stress building in the Scottish education system regarding teachers' workloads, especially since the changes in education policy introduced by the Scottish Parliament post 2000. Few studies of teacher stress in Scotland have been commissioned. In the review undertaken by Wilson (2002) only 14 out of 897 were identified, the majority of which were dated. The exceptions to

this have been detailed above. The most relevant research on Scottish teacher stress is provided by two studies funded by the EIS, both of which indicate that teachers perceive their workload to be increasing. Two other studies offered evidence of the potentially adverse affect of education reform on teachers. In these instances, teachers reported they believed more demands were being made on their time, a fact that caused them to feel stressed. These studies were all completed prior to the implementation of: *The Standards in Scotland's Schools etc. (Scotland) Act 2000; National Priorities in School Education* (SEED, 2000a); *A Teaching Profession for the 21st Century* (SEED, 2001) and *Curriculum for Excellence* (Seed, 2004).

In the intervening years since the reported research in the early 1990s, interest has grown in occupational stress in general and teacher stress in particular. This is a clear indication that the issue of teacher stress in Scottish schools is worthy of further exploration.

4.4   Aims of the study and the research questions

Based on my initial impressions from within the school context, now informed by the literature reviewed, the overall aim of the research study is therefore, to explore the extent to which there is evidence of occupational stress as reported by teachers, whether gender, age, and years in teaching may be factors, and also to seek to determine the sources of stress in terms of intrinsic or policy origin. Subsidiary aims are to explore whether (the sample of Scottish) teachers' perception of workload have changed since the previous national studies, whether their career development and CPD preferences in relation to new policy are additional sources of stress.

Research questions

These aims are formulated as guiding questions for the research. The overarching research question for the study is:

- What evidence is there from teachers of occupational stress in their work in relation to policy initiatives and change?

The associated sub-questions are:

- What are the origins and causes of reported stress, particularly in relation to policy change and traditional stressors reported in previous research?
- What kinds of experiences of stress appear in teachers' accounts?
- Is there a relationship between career development and workload stress?

4.5   Intended outcomes

At a time when teachers appeared to be experiencing some degree of stress, apparently related to the introduction of education initiatives, this study is intended to provide information on the real experiences of teachers working in two learning communities in a major Scottish city. Although the original literature review was begun in 2005, updated information (notwithstanding the source of the information) reveals that stress in teaching is still an issue for many teachers. TUC biennial surveys of union safety representatives in the education sector have consistently found stress to be the health and safety issue of greatest concern, with nearly two thirds of safety representatives citing it is as one of the top five problems faced by the teaching workforce in 2010 (National Union of Teachers, June 2012)

Chapter five which follows outlines the research methodology.

Chapter 5   Research Design

5.1   Overview

This chapter presents a justification for the research design and the methods used.

The strengths and weakness of alternative methodologies are discussed in relation to

the literature and the nature of the research questions addressed. The discussion

covers relevant issues of methodology and broadly acknowledges a "*philosophical*

stance or worldview that underlies and informs a style of research" Sapsford (2006,

p 175).

5.2   The research pathway

Social research can be regarded as a "*contested area*" presenting opposing ways of

looking at social reality and constructed on correspondingly different ways of

interpreting it. The fields of learning and subject areas covered by social research

include a range of approaches that have different conceptions of the nature of the

social world and the best ways of investigating them (Denscombe, 2002, p.1).

One approach to the conflicting ideas of the social world is to examine the explicit

and implicit assumptions behind them (Cohen, Manion and Morrison, 2007, p.7).

Burrell and Morgan (1979) (cited in Cohen et al, *ibid*, p.7) identified a number of

these assumptions. First, ontological assumptions are concerned with theory of what

exists, whether reality is objective in nature or the result of individual reasoning and

perception, making links with the philosophical *nominalist-realist* debate. Second,

epistemological assumptions are concerned with the study of knowledge and what

we accept as valid knowledge. This involves the examination of the relationship of

the researcher to that of the researched. If the researcher's view is that knowledge is objective and tangible then an observer role, allied to natural science and a more *positivist* approach is likely to be employed. Conversely, if knowledge is seen as personal, subjective and requires involvement with subjects, it is more probable that the researcher will develop an *anti-positive* approach to the collection of data (Cohen et al, *ibid*, p.7).

A third set of assumptions involves issues of human nature, particularly the relationship between people and their environment. Burrell and Morgan (1979) stress the significance of such assumptions in research where people are both the subject and object of study. Two images of humans emerge from a person/environment model: people are value free and unbiased; people are value-laden and biased. The difference is expressed through the theories of *determinism* and *voluntarism*, respectively.

The fourth set of assumptions relates to methodology. The *nomothetic* researcher is likely to be concerned with analysing the relationships and regularities between selected factors in the world and will adopt a predominantly quantitative approach with a focus on objective facts and formulating hypotheses. The measurement and the identification of underlying themes are based on a scientific search for cause and effect culminating in theory. Alternatively, the *ideographic* approach is qualitative in nature when the researcher believes that the subjective experience of individuals is the significant factor under investigation. The focus of this research is the way in which individuals create, modify and interpret their world, highlighting the

explanation and understanding of unique and individual cases as opposed to the general and universal; the interest is in a subjective, relativistic social world in contrast to an absolutist, external reality (Burrell and Morgan (*op.cit*); Kirk and Miller (1986, p. 14, in Cohen et al. *ibid* p. 8).

Below is table 1, which summarises the ontological, epistemological, human and methodological assumptions along a subjective – objective dimension.

A scheme for analysing assumptions about the nature of social science				
The subjectivist approach to social science				**The objectivist approach to social science**
Nominalism	<	ontology	>	Realism
Anti-positivism	<	epistemology	>	Positivism
Voluntarism	<	human nature	>	Determinism
Idiographic	<	methodology	>	Nomothetic

Table 1

The subjective – objective dimension (Source: Burrell and Morgan 1979 in Cohen et al. 2007, p.9)

Cohen et al (p.5), citing Hitchcock and Hughes (1995, p.5), suggest that

> *"Ontological assumptions give rise to epistemological assumptions; these, in turn, give rise to methodological considerations; and these in turn give rise to issues of instrumentation and data collection".*

Denscombe (2002) suggests that the social researcher is faced with a variety of options and choices and has to make careful decisions about which methodology to use. While there are many different methods of inquiry available to the researcher, Cohen et al (p.3) advise that above all else "*fitness for purpose*" must be the guiding principle, adopting an appropriate research paradigm that is compatible with the research purpose. Methodology provides reasons for utilising techniques in relation to the kind of knowledge that is being collected, developed or constructed.

5.3   Fixed and flexible designs

There is no solid agreement of the concept of the research process (Robson, 2002; Denscombe, 2002). Opinions differ about the place and role of theory and the sequence and relationship of the activities involved. The research process takes account of both the epistemology and ontology of the researcher. Research in social science is currently divided between two contrasting paradigms: the scientific empirical belief and the naturalistic qualitative approach (Denscombe, 2002; Charmaz, 2006). In his book "*Real World Research"* Robson, (2002, p.4) uses the terms "*fixed and flexible*" designs as opposed to quantitative and qualitative approaches. Designs in what might be termed "pure" science, involving theories with little apparent relevance to human concerns, are deemed by many to be the only valuable and valid means of conducting research (Charmaz, 2006, p.4, 5). These types of designs are referred to by Robson (*op. cit.)* as "*fixed*" research designs.

Fixed design is defined by the detailed pre-specification of what you are going to do and how you are going to do it, laid down prior to carrying out the research (Robson, 2002). Burns (2000) describes research as "*a systematic investigation to find answers to a problem*" (p.5). The traditional systematic investigative research in social science, generally referred to as positivism, has followed an objective scientific method that involves control at each step. In agreement with Sapsford (2006), Denscombe (*op. cit.* p.22), Kumar (1999) and Robson (2002) argue the case for the epistemology of the research to follow the rules of a scientific framework, i.e. to be systematic, sceptical and ethical in order to reach conclusions based on arguments that can be justified by data, collected and analysed using methods and techniques that have been tested for validity and reliability and are designed to be objective and unbiased. This conventional approach to social research incorporates methods and principles of natural science for the study of human behaviour. However, in the social sciences, rigid control cannot be enforced, nor is it always demanded (Kumar, 1999).

Denscombe (*op. cit.* p.16) suggests that in Western industrialised societies with a high regard for scientific knowledge, positivism has a strong common sense appeal. However, he also posits (p.17) that the lure of following the natural science model has been disputed by many researchers working in social research, the arts and humanities (Blaikie, 1993; Preece, 1994; Smith, 1998), particularly since we live in a world that recognises not just the strengths of science, but also its shortcomings. Positivism has been criticised in terms of its reflection of social reality and methods appropriate for studying social phenomena. In the "*real world*" the ontology of the

research i.e. "*objects*" about which questions may justifiably be asked includes behaviours or character traits or attitudes of people (Sapsford, 2006, p.175); using a positivist approach to measure social phenomena then becomes questionable (Kumar,1999; Robson, 2002; Sapsford, 2006). In early sociology, the focus of positivist research was inclined towards factual descriptions of societies and how they lived. However, more recently, while the scientific framework of the research has remained, the ontology has altered to emphasize real world experiences in terms of meanings and understanding, as opposed to objective factors. While opponents of positivism within social science contribute to various philosophies, each with its own faintly dissimilar epistemological viewpoint, they share a common certainty that human behaviour is not governed by general, universal laws, a mandatory feature of traditional research (Cohen et al., 2007).

Creswell (2003, p.179) states that qualitative research uses different knowledge claims, strategies of inquiry and methods of data collection and analysis. Those who employ an anti-positivist approach aim to provide an in-depth understanding of people's experiences and perspectives in the context of their personal circumstances or settings. An anti-positivist approach is characterised by a concern with exploring phenomena from the perspective of those being studied, using unstructured methods, for example, conversations, participant observation and focus groups (Cohen et al, *op. cit.* p.8). Much of the research undertaken in the fields of education, health and social work makes use of methods which result in qualitative data, which are detailed, rich and complex.

Robson (*op. cit.* p.4) refers to these as "*flexible*" designs. They are flexible in that much less pre-specification takes place. Approaches which include the labels interpretive, ethnographic and qualitative expect the detailed framework of the design to emerge during the study whilst the researcher interacts with whoever and whatever is being studied (Robson, 2002; Charmaz, 2006). Qualitative research is emergent and the data collection process might alter as doors open and close for data collection, as will be seen later in this chapter (section 5.8), when there was a need to change from an occupational journal to group interviews in order to collect further data from respondents (Creswell, 2003, p.179). Flexible designs generally favour more qualitative approaches, although quantitative methods can be used from an interpretive perspective (Patton, 1990; Robson, 2002). This type of mixed-method design is seen by Robson as being advantageous. Whether to use a qualitative or quantitative approach, or both, is determined by various factors, including the purpose of the enquiry. Kaplan (1973), cited in Cohen et al (2007, p.47) suggests that:

> "*The aim of methodology is to help us understand, in the broadest possible terms, not the products of scientific inquiry but the process itself*".

5.4   Addressing the research question

The best strategy for research is not how well it follows a given paradigm, but how well it addresses the topic under investigation; the force driving the research is the research question (Denscombe, 2002, p. 23). The main purpose of this study was to investigate if there was a foundation for initial impressions of stress in teachers and what, if anything, was the cause of the stress. In considering the inquiry into the experiences of teachers, account was taken of Burrell and Morgan's (1979) set of

assumptions, which highlight approaches to the conflicting ideas of the social world along a subjective – objective dimension (section 5.2 above).

The topic under investigation was the feelings and attitude of the teachers, connecting with the subjective experiences of individuals. Primary data were to be collected from the teachers themselves either directly or indirectly, using an epistemological approach based on the premise that data are contained within the perspective of teachers interacting with colleagues, pupils, management, education authorities and government. Emphasis is placed on the accounts given by individuals, an interest in their subjective, relativistic social world, rather than an absolutist, external reality. When compared with the ontological, epistemological, human nature and methodological assumptions set out in Table 1 (section 5.2) above, the way forward for this study veers towards nominalism, anti-positivism, voluntarism and ideographic approaches, allied to a subjectivist or interpretive perspective. This qualitative approach is further supported by Flick's (2002, p5) view that an alternative determining factor in choosing a method of inquiry is the object under study, in this case the object being "teachers' perceptions of occupational stress" . Flick posits that in qualitative research "*objects are not reduced to single variables, but are studied in their complexity and entirety in their everyday contexts*" (p.5). He further states that "*the fields of study are not artificial situations in the laboratory but the practices and interactions of the subjects in their everyday life*". He suggests that qualitative research allows for the fact that differences in perspectives and practices in the field may be due to variant personal characteristics.

5.4.1 Values, objectivity and bias

Before proceeding to outline the methods adopted in the study, it is necessary to discuss a contentious area of interpretive research, that of values, objectivity and bias.

The expression of preference is the expression of some value that we hold. Denscombe, (2002, p.166) argues that "*our values are our skin, not our clothes. They cannot be changed at our convenience*". Researchers bring their own implicit values and beliefs which influence the research in terms of, inter alia, choice of topic, choice of methods and analysis. In acknowledging this issue, Denscombe (p.167) advises that rather than insisting upon a value-free approach to social research, there should be a sense that the researcher's social values do not infringe unnecessarily on the research. Researchers should acknowledge and make their values as explicit as they can, so that readers of the research findings have a clear vision of the project and can evaluate the results and analysis from an informed position. Denscombe (2002, p.158) believes that researchers require to be open-minded and self reflective and questions whether research can ever be totally neutral and equitable; whether findings can ever truly escape the pre-conceptions and attitudes of the researcher.

While there is a an assumption that objectivity be attained, as it a crucial factor in the evaluation of research findings, nonetheless, a researcher adopting a hermeneutic methodology can never be entirely objective, since researchers' views are shaped by the time and culture in which they live. Gender, age, social class and level of education contribute to concept formation and to some extent, prevent pure

objectivity. Objectivity in social research calls for detachment. Detachment should not entail the impossible demand that the researcher somehow discards his or her personal views, emotions and preferences or lifetime experiences; rather, objectivity can be seen as a matter of degree, which consists of achieving a level of detachment specifically for the purpose of the research, providing the researcher with a means of viewing the research topic from an unbiased perspective (Denscombe (*ibid.* p.168).

Notwithstanding the limits to achieving total objectivity, most researchers deem it an ideal to which they should aspire in terms of a reasonable level of detachment and a reasonable level of open-mindness when considering the data and the findings from any particular piece of research. The social researcher needs to be aware of, and honest about, how his or her beliefs, values and biases affect the research process (Lather, 1993).

5.4.2 Methodological options

The development of a research project is a balancing act which requires the agreement of planned possibilities with workable logical practice i.e. the process of resolving the difference between what can be done, what one would like to do and what will actually work and what one would actually do, for, as ultimately, research has to work (Cohen et al, 2007, p.78). There are two phases in planning: first, the divergent phase opens a range of possibilities and second, the convergent phase sifts through the possibilities to see which ones are desirable, compatible with each other and will actually work in the situation. This involves designing a strategy that has a

logical set of steps that connect the purposes with questions with the way that data can be collected.

As stated previously, the research purpose has a major influence on the research design. The purpose of the study was to determine to what extent, if any, changes in education policy had had on the professional life of teachers as reported by them. The major policy changes already outlined in previous chapters (section 3.2) were introduced consecutively at the start of the 21st century. Anecdotal evidence suggested that teachers were expressing feelings of stress and overwork from the volume of innovation that was taking place. It was this observation of the pressure that teachers expressed they were feeling that instigated the present enquiry. From the outset, I was interested in what aspects of their work teachers currently reported were causing them pressure in their professional life. A mixed-method approach was seen as the best way to investigate these issues, following consideration of alternative strategies such as phenomenology, participant observation and case study, outlined below.

5.4.3   Phenomenology

There are a variety of qualitative approaches available for an investigation of the subjective world of human experiences. Initially I considered a phenomenological approach, carried out by asking teachers throughout Scotland what in their opinion, had the recently introduced education policy changes had on their working life. However, practical constraints in relation to what was feasible within the time limits and scale of a professional part-time doctorate study prevailed over the idealised

study, influenced by such as Cohen et al, discussed above. The study group was therefore reduced to include teachers and headteachers in two adjacent learning communities in a major Scottish city.

A phenomenological approach attempts to illuminate the specific; the aim is to identify phenomena through how they are perceived by the "actors" in the situation. Merriam (2002) suggests that phenomenology as a school of philosophical thought is the foundation of all qualitative research (p.7), although Patton (1990) claims that the term phenomenology has become so widely used that confusion has arisen as to its precise meaning (p.70). Phenomenological methods are effective in highlighting the experiences and perceptions of individuals from their own viewpoint. Such approaches to qualitative research stress the importance of reflexivity, i.e. an awareness of the impact the researcher's individual social identity and background may have on the research process (Robson, 2002). Robson outlines reactivity, respondent bias and researcher bias as three potential threats to the validity of flexible design research. Reactivity is the term used when participants behave in a certain way when they are aware that they are part of a study and, or, when they are influenced by the presence of the researcher or research instrument.

This was a potential cause for concern as the study took place within and outwith the location in which I worked. I was known to some of the participants, a fact that could have affected their behaviour, positively or negatively. For example, those who knew me well may have simply completed the questionnaire as a favour to a friend; and the fact that I was asking questions about pressures in teaching, may have

caused them to admit to feelings of stress they did not have, or indeed the opposite. Respondent bias was also a possibility for the same reason, as personality or familiarity might have had an effect on responses to questions. Since this study was undertaken by a researcher (me) with "insider" knowledge, prejudice or bias may have (subconsciously) influenced / affected my behaviour or interviewing technique, the selection of participants, or selection of data for reporting and analysis. Robson (2002) suggests that these issues are present in all research relating to people, and the concept of "researcher-as-instrument" emphasises the potential for bias (*ibid.* p. 172).

Phenomenological research also imposes significant barriers for the novice researcher due to the highly specialised language used, and the requirement of a solid grounding in some challenging philosophy. Patton (1990) on the other hand, posits that conducting research with a phenomenological focus differs from utilising phenomenology to philosophically defend the chosen methodology in a qualitative study. He argues that a general phenomenological perspective can be used to explain the importance of using methods that capture people's experience of the world without conducting a phenomenological study that focuses on the essence of shared experience (p.71).

Both Merriam (2002) and Robson (2002) agree that a phenomenological study focuses on the subjective experiences of those studied in order to create their worldview. Patton (1990, p.70) agrees, but extends the debate by claiming that two interpretations of this viewpoint are possible when discussing qualitative strategies. A phenomenological study can focus on what people experience and how they

interpret the world. The second orientation is methodological in that, the only way that we can really know what another person experiences is to experience it for ourselves. This perspective would suggest participant observation as a research method.

5.4.4 Participant observation

Robson (2002) describes participant observation as the method used when the observer (researcher) seeks to become in every essence a member of the group being studied. In this case, I already was a member of the group being studied and as such had experience of the phenomenon being investigated. Robson (2002) cautions against the danger of such studies being classified as `bad science´, due to questions of subjectivity by those entrenched in the traditional methods of quantitative research. He argues that objectivity can still be achieved when the epistemology follows the rules of science as discussed earlier (section 5.3). Objectivity can be approached through a heightened awareness of the problem of subjectivity and the need for valid explanation of the findings.

Bailey (1994, 243 – 4, cited in Cohen et al, 2007, p. 260) identified some inherent advantages of using a participant observation approach which include the following. Observation studies are superior to experiments and surveys when data are being collected on non-verbal behaviour; this approach would have been useful in the current study when looking for signs of stress-induced behaviour in participants. In observation studies, it is possible to determine ongoing behaviour as it occurs and to make appropriate notes about its salient features. Since observations take place over

an extended period of time, researchers can develop more intimate and informal relationships with participants, generally in more natural environments than those in which experiments and surveys are conducted. However, these advantages identified by Bailey would be outwith the realms of the possible in this study, in terms of time constraints and access to a selected population. I was in full-time employment as a teacher and would not have been allowed leave from work to conduct the research; and accessing participants who were willing to be observed over a period of time could also have been problematic. For these reasons, participant observation was considered to be inappropriate.

5.4.5   Case study

Case study research allows the exploration and understanding of complex issues. It can be considered a robust research method particularly when a holistic, in-depth investigation is required. Through case study methods, a researcher is able to go beyond the quantitative statistical results and understand the behavioural conditions through the actors' perspective. By including both quantitative and qualitative data, case studies help explain both the process and outcome of a phenomenon through complete observation, reconstruction and analysis of the cases under investigation (Robson, 2002, p.183; Cohen et al, 2007, p.253-4). Case studies are set in temporal, geographical, organisational, institutional and other contexts that allow for the setting of boundaries. Case studies in their true essence explore and investigate contemporary real-life phenomenon through detailed contextual analysis of a limited number of events or conditions and their relationships, recognising the influence of

context in determining cause and effect relationships (Cohen et al p.253). Yin (1984, p.23) defines the case study research method as:

> "a*n empirical inquiry that investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used.*"

As the aim of the study was to explore the foundation for initial impressions of stress in teachers and causes thereof, using a case study methodology was seen as an initial possibility; however, several factors prevented this. First, from a geographical perspective, there was a sampling issue: whether to include one teacher from each school in the learning community; one school in both learning communities; or all schools. As case study literature acknowledges:

> "*contexts are unique and dynamic, hence case studies report the complex, dynamic and unfolding interactions of events, human relationships and other factors in a unique instance*"   (Cohen et al, p.253)

There were issues related to studies of workplace stress to consider as

> "w*hen applied to occupational stress, the components of this three-way transactional model are the work environment, the person and the physical, mental and behavioural exhibits of stress*,
>
>   (Guglielmi & Tatrow, 1998, p.62, see section 4.2.2).

Given the number of possible variables that might apply, I felt that a narrow study of a single teacher or school would not obtain a complete picture of the factors involved; and it may not be possible to answer the research question fairly, if there were a limited number of teachers or schools in the study. The aim was to reach all teachers in the learning communities in order to maximise the number of participants to afford a degree of reliability to the study; plus there was the potential for bias if there were geographical constraints, as there are differences in the socio-economic

environment of the schools considered for the study (section 1.8). Second, "*case studies have temporal characteristics*" (Cohen et al, 2007, p.253). It would have been very difficult to find time to visit the schools in the study within a restricted time frame.

In addition, workload may be dependent on the time of year, as found in some research which identified a cyclical pattern in the effects of overwork related to the academic year (Kinnunen and Leskinen, 1998, section 4.2.8). A case study would have involved an investigation potentially lasting over the period of a school term. By choosing a specific time, I could have been accused of bias as, given my position as a classroom teacher, I was very aware of times in the school year when there was more scope for pressure than others and given the diversity of events taking place throughout the school year, there was the possibility of excluding relevant data. Furthermore, observation of teachers may not have provided evidence of all work-related stress factors, since the literature reported "*curriculum planning, assessment and record keeping*" as contributing to pressure for teachers (section 4.2.6); and again, my insider knowledge suggests these are tasks which teachers may undertake outwith the school day.

After considering all of these constraints, it was decided that although this study would provide information on the real experiences of teachers working primarily in one learning community in a major Scottish city i.e. "on teachers in a set place and time" it would not be a case study in any strict sense.

5.4.6   Mixed methods approach

My interest lay in establishing whether teachers were under pressure from education policy introduced from the year 2000. According to Denscombe (2002, p15), social researchers need to use appropriate tools and techniques to discover and examine the patterns and regularities in the social world. Possible options for answering the research questions were a questionnaire survey, daily diary and face-to-face interviews. Patton (2002, p.5) suggests that qualitative findings may be presented alone or in combination with quantitative data. At the simplest level this might be a questionnaire or interview that asks both closed and open questions, producing both quantitative and qualitative data for analysis. I made the decision to use a questionnaire survey as my first data collection method, and to ask teachers who completed the questionnaire, to volunteer to keep a diary of the work they undertook during one week. Johnstone (1993) had used workload diaries as one method of collecting data in her major research on Teachers' workload and associated stress in Scottish schools (see section 4.2.9). I considered this an appropriate means to add to the data provided by the questionnaire. In the introductory letter accompanying the questionnaire I did not use the term "workload" diary as used by Johnstone since I wished to avoid bias.

Briefly, the first reason for choosing a questionnaire rather than interviews was related to sampling. I considered that it would have been difficult to obtain a reliable interview sample size that was representative of the teachers in the schools in the learning communities, in relation to feelings of stress. I also had concerns about achieving anonymity for a small number of respondents who might agree to take part

in a lengthy interview. Plus, I wished as large a sample size as possible in order to obtain as wide a perspective of teachers' views as possible, and the most economic means of achieving this in terms of cost and time was via a postal questionnaire. This plan would provide both quantitative and qualitative data in a mixed method design. (Ultimately, there were no occupational diaries, as no teachers volunteered to participate in this part of the research. Instead I used group interviews with a small number of volunteers, to provide a deeper understanding of the stress felt by teachers).

Kumar (1999) and Denscombe (2002) remind us that the research purpose should dictate the mode of inquiry and therefore the paradigm to be employed, while Robson (2002, p81) states that the strategies and methods for data collection chosen for a study differ in relation to the type of research question posed. Patton (1990) argues that rather than choose between one paradigm and the other, the researcher should employ a paradigm of choices involving "*rejecting methodological orthodoxy in favour of methodological appropriateness*" (p.39). The question then becomes, not whether the researcher has strictly followed the rules of logical-positivism or phenomenology or whatever, but whether appropriate design decisions have been made in relation to the purpose of the research, the question being investigated and the resources available. Patton's (2002, p. 257) "*paradigm of choices*" acknowledges that different methods are appropriate for different situations and the researcher should not be confined to the narrow limitations of a single methodological paradigm.

Cohen et al (2007, p. 47) seek to present both normative and interpretive perspectives in a complementary light, in an effort to moderate the tension that is sometimes generated between the two. They cite Merton and Kendall (1946, no page number given) who state:

> "*Social scientists have come to abandon the spurious choice between qualitative and quantitative data: they are concerned rather with that combination of both which makes use of the most valuable features of each. The problem becomes one of determining at which points they should adopt the one, and at which the other, approach*".

The conflict between positivism and interpretivism is something that exists in principle more than in practice, and since both paradigms have their strengths and weaknesses, the maturing field of social research is more willing to accept that neither has all the answers. Although there are numerous studies which have attempted to combine the two positions and make use of the best aspects of both, currently, there is no general theoretical stance that has been able to successfully combine the strong points of either approach and avoid criticism linked to their weaknesses (Denscombe, 2002, p. 22). While there is as yet no agreed taxonomy, in practice, empirical social research is now at a point where, although they may feel that one position is more preferable than the other, researchers will use the other perspective when they feel it is necessary. The ontology and epistemology of positivism and interpretivism have been deemed incompatible, nonetheless, social researchers may now be more willing to choose the most effective methods and strategies available from the range in order to achieve the most robust and valuable findings for their investigation.

Thus social research has moved towards pragmatism.

> *"What is suitable, itself, depends on what it is practical to accomplish and what kind of data are required. It is a mater of what is needed and what works best to achieve it, selecting methods and analysis that provide the kind of findings that work best, while acknowledging that all approaches have their limitations and that there is no perfect approach".*
>
> Denscombe (2002, p.24)

Although the data gathering and analysis process would begin with a questionnaire survey, it was not appropriate to continue in this positivist manner as the study was concerned with the personal opinions of the target population and therefore would not be "value-free" or objective - a pre-requisite of a positivist approach; subsequent data would generate from semi-open interviews, using methods embedded within an interpretive framework.

5.5 Method and data sources

The credibility of findings depends on the measures used and also on who replied (Johnstone, 1993). This section describes how the data were gathered, the measures used, how the questionnaire was constructed, how the sample was obtained and who the respondents were.

5.5.1 *Measures*

Two types of measures were used to obtain data for the study, both quantitative and qualitative. The first measure was a self-administered postal questionnaire. The second measure was a semi-structured group interview with a small number of teachers from within the sample, who had volunteered to take part.

5.5.2 *Questionnaires*

The descriptive questionnaire survey is a widely used and useful method of gathering descriptive information in educational research (Burns, 2000 p.566; Cohen et al, 2007, p. 325). The questionnaire may be administered by interview, by mailing a self-completion form to respondents, or by telephone. Burns (2000), Cohen et al (2007) and Robson (2002) outline a number of positive and negative aspects of postal questionnaire surveys. On the positive side they are an excellent way of collecting large-scale quantitative data. They are usually less expensive than face-to-face interviews in terms of cost and travelling time (in the current study it would have been very difficult to conduct interviews due to constraints of time off from teaching, for both myself and respondents). In addition, each respondent receives an identical set of questions which increases the standardisation of responses; and interviewer bias may be less likely since the researcher has no direct contact with the respondents. In a postal questionnaire, respondents may answer questions in their own time and at their own pace. A further advantage is related to modern technology which facilitates the analysis of data through the use of computerised programmes such as SPSS. Furthermore, new technology permits the researcher to establish correlations between variables which allow the researcher to go beyond description and look for patterns in the data. There is the added advantage that a questionnaire that can guarantee anonymity and confidentiality, may obtain more candid responses from respondents.

On the negative side, the data gathered can be chiefly descriptive and can appear to some extent, superficial. As a result, while statistical analysis can generate

correlations between elements of the study, it cannot generally establish cause and effect relationships. A further criticism that offsets the advantages of this type of research method, possibly the principal one, is response rate. It is not unusual to have a response rate as low as 25% which poses problems of reliability and validity since those who took time to complete the questionnaire may be unrepresentative of the sample population. Further criticism is raised by those who favour interpretivism, claiming that reality is more multifaceted than the small number of variables that are contained in a questionnaire and as such, a questionnaire cannot cover the true extent of a social phenomenon.

5.5.3 *Construction of the questionnaire*

Taking cognisance of Burn's (2000) observations, that questionnaire items may be developed from a literature review and preliminary discussions with potential respondents, the initial quantitative measure was devised using a questionnaire derived from information gathered from three different sources (for a copy of the questionnaire, see Appendix 2).

First, the questionnaire contained a series of closed questions based on a validated questionnaire developed and administered by Travers and Cooper (1993) (see sections 1.4.1 and 4.2.6) which used, inter alia, an inventory of items relating to sources of pressure for teachers. This inventory was considered to be relevant to the current study as it incorporated aspects of stress related to change in education policy; and in terms of the aims of the Travers and Cooper study, one of which had been to investigate the effects of both intrinsic and contemporary stressors involved

in teaching in order to highlight which features of the teachers' job best predict those at high risk. These aims are similar to the aims of my study, an investigation of sources of work related pressure for teachers.

In order to obtain factors of intercorrelated items that could be used in subsequent bivariate analysis and multiple regression analysis, Travers and Cooper (*op.cit.* p.207) performed a principal-components factor analysis on the 98-item inventory. Using the criteria of eigen value equals 1 and an initial factor loading cut-off point of above 0.3, 10 factors were obtained. After further subjective viewing of the factors, the researchers used a cut-off point of 0.4 as this reduced the number of "factor-duplicated" items, and increased both the reliability and the conceptual clarity of the 10 factors that had a satisfactory fit with the data and evidence from literature and interviews. As a result, the 98 items were reduced to 46. In the current study, using a combination of the available literature, the responses to the open-question discussed below and 43 relevant items from Travers' and Cooper's item bank, 108 independent variables were identified.

Open-ended questions are useful if the possible answers are unknown or their purpose is exploratory, and may also be useful for identifying items that will later become the focus of closed questions in a subsequent questionnaire (Cohen et al, 2007, p. 321). This was the approach taken by Travers and Cooper (1993) when they constructed their 98 point inventory of pressures for teachers. Thus, the second source of questions for my questionnaire originated from an open question, which asked respondents to consider what work-related factors might be a source of

pressure for them. An accessible group of fourteen teachers who worked for the local authority, but not in the Learning Communities in which the study took place, responded to this question. The teachers were a cross section of the teaching population in terms of gender, age and experience, primary and secondary school sectors and designation. All were members of a working party with which I was involved in 2005. Teachers were aware of the purpose of the question – to gather information that could be used in constructing additional contemporary questions related to job pressures that might exist in the climate of change and innovation that existed in Scotland in 2005. All were willing volunteers in the task and were assured anonymity and confidentiality.

The teachers were asked simply to write a list of aspects of their working life which caused them stress (Appendix 5). A selection of responses given included: *record keeping, keeping whole class fully engaged and interested, marking pupil work; communication within the school, lack of information –people just turn up; managing the curriculum – the width – within time scale allowed; workload, forward plans, daily planning of lessons; assessment – trying to ensure each child gets best education; discipline – lack of interest, low key continuous misbehaviour; workload, tasks / meetings etc arranged with insufficient notice, the role of the teacher..*

The responses were analysed using simple content analysis by identifying themes within the answers and counting frequencies within these themes (Appendix 5). The main themes that emerged were: *paperwork, pupil misbehaviour/ inclusion, workload, and the role of the teacher*. There were similarities between these results

and those found by the exploratory semi-structured interviews that had been conducted by Travers and Cooper that led to the development of their sources of pressure item bank; for example, lack of support from the government, dealing with basic behavioural problems, teaching those who do not value education, and the need for assessment of pupils. Questions relating to workload, curriculum development and communication within the school, themes that were not already covered by the Travers and Cooper inventory, but had been identified in previous research (for example Johnstone, 1993, Male and May, 1998 and Travers, 2001), were added to the questionnaire. The third source of questions was literature relating directly to the educational policies that had been introduced i.e. National Priorities in Education and A Teaching Profession for the 21st Century. Questions linked to these form the majority of questions in section 11 of the questionnaire and the second half of the questions in section 8 linked to workload.

Cohen et al (2007, p. 506) and Creswell (2003, p. 157) advise measuring the internal consistency of the instrument used for data collection, even, or especially if a previously validated instrument is used, as modifying the instrument can affect the validity and reliability . Cronbach's alpha was calculated for each set of questions in the current study. For the alpha coefficient the following guidelines can be used:

> 0.90	very highly reliable
0.80 – 0.90	highly reliable
0.70 – 0.79	reliable
0.60 – 0.69	marginally/minimally reliable
<.60	unacceptably low reliability (Cohen et al. 2007, p.506)

Bryman and Cramer (1990, p.71,cited in Cohen et al, 2007) suggest that the reliability level is acceptable at 0.8, although others suggest that it is acceptable if it

is 0.67 or above (Cohen et al, *ibid.*). The alpha for each section (factor) in the questionnaire is outlined below. Travers' and Cooper's alpha for each factor is given in brackets. The workload section and National Priorities sections were not part of Travers' and Cooper's questionnaire. The sections (factors) in the questionnaire are concerned with: section 2, *pupil/teacher interaction*, alpha = 0.921 (0.92); section 3, *management/structure of the school*, alpha = 0.884 (0.85); section 4, *school environment*, alpha = 0.879 (0.80); section 5, *changes taking place within education*, alpha = 0.858 (0.77); section 6, *Appraisal of teachers*, alpha = 0.883 (0.73); section 7, *the concerns of management,* alpha = 0.991 (o.75); section 8, *workload*, alpha = 0.935; section 9, *status/promotion opportunities*, alpha = 0.753 (0.75); section 10, *ambiguity of the teacher's role*, alpha = 0.803 (0.73); section 11, *relating to national priorities and local authority initiatives,* alpha = 0.847. As can be seen *pupil/teacher interaction, the concerns of management and workload* factors have a very high reliability level and the others are highly reliable with the exception of *status/promotion opportunities* which although it has the lowest alpha it is still within what is considered a reliable level.

5.5.4   *Layout of the questionnaire*

In addition to the questions and the format used to ask them, the overall design of the questionnaire is important. Care was taken to ensure that the appearance of the questionnaire was of a high quality and that instructions were clear (Burns, 2000; Robson, 2002). The questionnaire was somewhat lengthy in that it attempted to cover a range of aspects and was divided into twelve sections. Simpler demographic questions were placed at the start followed by more demanding ones. Heeding the

advice given by Burns (*op.cit.*) each section had a clear heading, dealt with a specific

topic and used the same response option. The intention was to sustain a degree of

commonality in response formats so that some familiarity with the procedure could

be established, while including enough differences to discourage the tendency of a

response pattern across items. The types of formats used included:

- tick boxes for general demographic information

- rating scales

- open-ended responses

Cohen et al (*op. cit.* p. 330) suggest that it is the open-ended responses that might

contain the "gems" of information not generated by the questionnaire; and it puts the

responsibility for ownership of the data much more into the hands of the respondents.

Only a few open-ended questions were included to reduce the time required to

complete the questionnaire and to encourage a higher response rate, as well as

keeping data and workload at an achievable level.

5.5.5 *Rating scales*

The manner, in which degrees of response, intensity of response, and a move away

from dichotomous questions have been dealt with, can be seen in the notion of rating

scales, for example, Likert scales. Rating scales are a useful and widely used tool in

research, as they combine the opportunity for a flexible response and build in a

degree of sensitivity and differentiation of response while still generating numbers.

Likert scales provide a range of responses to a given question or statement and

assume a unidimensionality in the scale, in that they measure only one item at a time.

They are a means to determine frequencies, correlations and other forms of

quantitative analysis and give the researcher the option to combine measurement with opinion, quantity and quality (Cohen et al *ibid.* p.327).

Most attitudes are the result of either direct experience or observational learning from the environment. In a questionnaire, respondents are asked to indicate their agreement or disagreement along for example, a 3, 5, 7 point scale, ranging from strongly agree to strongly disagree, to each attitude statement selected by the researcher. No judges are used to rank the scale statements; it is understood that participants will recognize strongly agree as being more favourable towards the statements than moderately agree and strongly disagree. In the current study a four-point scale was used: strongly agree, agree, disagree and strongly disagree, though there is no assumption of equal intervals between the variables. This was an attempt to ensure that respondents made a clear decision. Several questions worded in a reverse direction were placed randomly within the questionnaire e.g. "*work requirements can be completed in the contracted 35 hour week*"; "*much of the time I have to force myself to go to work*". This process known as a response set, is used to discourage respondents from simply ticking boxes down one column, but rather to read and appraise the statements carefully, thus increasing reliability and validity. A subject's score is tabulated by assigning a numerical value to each of the answers, ranging from 1 for the alternative at one end of the scale, for example, to 4 for the alternative at the other, and then summing the numerical values of the answers to all questions.

Burns (2000) and Cohen et al, 2007) advise the researcher of some limitations in the use of rating scales in research. For instance, the researcher may infer a degree of feeling and detail from the data that is not valid, and also, like all self-report measures, attitude scales may have low reliability and low validity as subjects may not be honest in their responses, or may give what they think are socially acceptable answers. There is no way of knowing if respondents wished to add more information about the issue under investigation, however in this study, the participants were given the opportunity to add further comments at the end of the questionnaire if they so wished.

5.5.6   *Administering the questionnaire*

In order to maximize the return rate it is essential to produce a well-designed questionnaire whose purpose is clear (Gillham, 2000). Each questionnaire was accompanied by an explanatory letter (included in Appendix 2) that introduced me and stated the purpose of the research; at the same time encouraging participants to respond and assuring them that their comments would be invaluable in the study. An approximation of completion time was given and an assurance of confidentiality was stated. Respondents were thanked in advance and a return-by date given, accompanied by a pre-paid envelope. My contact details were also listed on the covering letter.

5.5.7   *Piloting*

A pilot has several functions, the principal one being to increase the reliability, validity and practicality of the questionnaire. Other functions include checking the

clarity of the questionnaire items, instructions and layout; eliminating ambiguities or difficulties in wording; gaining feedback on the types of questions and the time taken to complete; and to try out the coding /classification system for data analysis. The functions outlined above describe a particular type of pilot, one that does not focus on data, but on clarity and comprehension, obtaining feedback from a limited number of respondents on the questionnaire items (Cohen et al, *op. cit.* p. 341).

The questionnaire was piloted with three teachers who were not part of the sample, but who worked for the local authority in which the study took place. Minor ambiguities were discussed with the teachers and wording of questions amended accordingly. For example, question 1.4 was rephrased and section 7 which addressed concerns related to management only, was repositioned on a page by itself. An open-ended question on page 12 that asked respondents to make a list of CPD activities which they undertook, had posed no problems for the teachers in the pilot. However, in later analysis, I considered that the open format of the question was inappropriate for the type of information being sought; and a closed question that asked respondents to choose from a list of CPD options would have provided more detailed information. The reason for this may have been that I took the opportunity to ask three teachers whom I knew from previous CPD undertakings to complete the draft questionnaire, and thus they may have had a focus on CPD that some teachers in general do not have.

5.6   Sampling

In addition to the appropriateness of the methodology and the data gathering instrument, the suitability of the sampling frame adopted is fundamental to the quality of the research. Two general approaches to sampling are used in social science. Probability, or random sampling, affords every person in the population an equal chance of being selected; and the mathematical probability can be calculated. The usefulness of this type of sample is that it can be considered representative of the whole population to which results can be generalised (Cohen et al, 2007, p110). In contrast, and less desirable (Creswell, 2003, p.156), is non-probability sampling, when individuals are selected on the basis of their availability, e.g. because they volunteered. In this instance, unknown fractions of the population are excluded because they did not volunteer. A common type of non-probability sample is a convenience sample, thus called because the researcher uses whichever individuals are available, rather than selecting from the entire population (Flick, 2002, p. 68). This type of sample cannot usually be considered as representative and findings cannot be generalised.

Sampling decisions cannot be made in isolation. The appropriateness of the sampling frame can only be assessed when considered alongside the research questions; which and how many participants are necessary to answer the research questions (Flick, 2002, p.71). As previously stated (section5.4.5) I wished to obtain as large a sample as reasonably possible. To learn more about the existence of occupational stress and to maximise the potential number of responses, I made the decision to collect data from all teachers and headteachers in two adjacent learning

communities in a major Scottish city. This would have potentially raised a sample of around 300 participants.   An important aspect of a sample is representativeness, (Cohen et al, *op .cit.*) but even before the issue of a relatively low response rate materialised, there was no intention to claim that the sample in this study was representative of the teaching population as a whole. Although the education policies introduced by the Scottish Parliament are applicable to all teachers, there are a considerable number of variables that can differentiate the experience for many. These include the setting of the school, rural or urban; the geographical location within Scotland and thus the influence of the local authority; the economic location of schools in affluent or socially disadvantaged areas; and the management of schools, which can influence how and at what pace policy changes are implemented. At best, the study findings might be seen as representative of teachers working in a socially disadvantaged area of a major city.

5.7   Access and participants in the study

From the perspective of everyday practicality, the question of how to gain access to a chosen population or field can be problematic in terms of securing the collaboration and willingness of potential participants who will provide useful, concrete data (Flick, 2002, p. 53).

At this point, it is important to acknowledge my position as a teacher in the learning community in which I worked and how this may have affected the sample population.   I have worked in the same school for almost 20 years and was well known to many teachers in the primary sector through attending CPD activities

organised by the learning community and also by the local authority. I had been a member of several working parties or liaison groups organised by the secondary school, so was also known to a small number of teachers there. It could be said that my position was advantageous in accessing a sample of teachers within the learning community, as I had a good working relationship with many; a fact that may have influenced the decision to respond to my request to complete the questionnaire. Conversely, I was completely unknown to head teachers and staff in the adjacent learning community I wished to include in the study, and this may have been a factor which precluded these schools from participating in the study. Those who choose not to participate in a study bias the sample, as it is difficult to know why they failed to return the questionnaire or participate in an interview. It is difficult to know if they would have given the same distribution of answers as those who participated. The lower the response rate the greater the sample bias (Cohen et al, 2007, p. 157).

Prior to the study taking place, I sought and obtained permission from the education department of the local authority to administer the questionnaire, with the stipulation that the final decision for participation by school staff lay with the head teachers (Appendix 1). The education authority imposed the condition that I attach a copy of their letter of consent when contacting head teachers of the schools. I complied with this condition when I wrote to the Principals of the two learning communities asking permission to attend a Headteachers' meeting to introduce the topic of the study to them (Appendix 3). I received a verbal reply (via my headteacher) from the learning community in which I worked stating that it was not necessary for me to attend a

meeting, that the matter had been discussed and all headteachers of the primary schools and secondary school had agreed to the study taking place.

I also received permission from the Principal of the adjacent learning community to contact the headteachers of the schools. I did this via email as I thought it was the most efficient method, but despite a follow up request only one school in that learning community responded and agreed to take part in the study. It may be argued that the headteachers of the other schools did not wish their teachers to take part in the study, or perhaps teachers were too busy or not interested. This lack of response more or less halved the potential study population, and more or less restricted the study to one learning community, preventing a reliable comparison of primary and secondary teachers from taking place, due to the small number of participants involved.

The total number of potential respondents to be contacted was now relatively small. The questionnaire was sent to all teachers in one secondary school (*n =74)* and 5 primary schools (*n =74)*, whose headteachers had given permission for the questionnaire to be administered. To increase the response rate and gain a wider perspective of teachers' CPD experiences, teachers who were currently studying for an M.Ed / Ed.D but who were not part of either learning community, were contacted via email through the education department of the university at which they were studying. The demographic profile of the teachers who responded to the questionnaire is given in the next chapter (section 6.2.3).

5.8   Semi-structured group interviews

To obtain a deeper understanding of the pressure felt by teachers in the study, the letter accompanying the questionnaire had asked teachers to volunteer to keep a work diary for one week. No teachers had responded to this request. Therefore, in order to understand in personal terms the difference stress had made in their lives (Patton, 2002, p.16), I approached several teachers who were accessible and known to me and invited them to participate in a group interview. Nine teachers agreed to take part in the group interviews. The fact that my position as the researcher might have influenced the teachers' decision is of course a limitation of the study. The group interviews, one with four participants and one with five, had some things in common with the philosophy of focus groups or group discussions as outlined in Flick (2002, chapter 10).

Focus groups are used as a method in their own right or in combination with other methods. They are useful in a number of ways: orienting the researcher to a new field; generating hypotheses based on informants' insights; evaluating different research sites or study populations; developing interview schedules or questionnaires and getting participants' interpretations of results from earlier studies (Morgan, 1988, p.11 cited in Flick, 2002, p.120). The group interviews conducted in this study were not, and were not intended to be "focus groups" as a research method, since none of the aforementioned purposes was my intention.

Group interviews are a means to capitalise on communication between research participants in order to generate data. The main advantages of group interviews are

that they are often used simply as a quick and convenient way to collect data from several people simultaneously; they may stimulate the participants and support them in remembering events and they can lead beyond the answers of the single interview. Critics of standarised interviews argue that the context of the interview is artificial in as much as the interviewee is separated from all everyday relations and everyday interactions (Flick, *ibid.* p.112). By having extended the scope of the data gathering process when investigating opinions and attitudes to sensitive issues, the use of the dynamics of a group discussing such topics can be more appropriate than a structured interview context. The interviewer should be "*flexible, objective, empathetic, persuasive, a good listener*" (Fontana and Frey, 2000, p.652 cited in Flick *ibid.* p.113).

Objectivity here mainly refers to the mediation between the different participants. The role of the researcher in a group interview may be limited to prevent any biasing influence on the ongoing discussion and content that may arise from his or her intervention. The researcher may take control by steering the discussion through introducing new questions. He or she can also take control to ensure that individuals do not dominate the conversation and thus prevent more reserved members from having their say; and to ensure that answers are obtained from all members of the group in order to cover the topic as far as possible. Group interview is a means of collecting qualitative data that provides a measure of quality control, since participants may provide a check on opinions that are considered to be erroneous, not socially shared or extreme, and are thus a measure of validating statements and

views; and it is easy to assess the extent to which there is a relatively consistent shared view among the participants (Patton, 2002).

Some methodological discussions about the use of this process have centred on the concept of what a group is, contrasting a natural group, i.e. existing in everyday life, with an artificial group, i.e. a number of people put together for the research purpose according to certain criteria (Flick, *op. cit*. p.115). In this study, the two groups were considered to be natural groups as each consisted of teachers who may have known each other well through working together. They were also homogenous groups in that they consisted of female, primary school teachers, sharing a similar working-life background. Niessen (1977, p.64, cited in Flick, *op. cit*. p.115) advocates the use of real groups i.e. persons who are concerned by the issue being discussed outwith the context of the group, and who are also participants in the research study. Artificial groups require that participants have a warming-up phase when they are introduced, get to know one another and have a preliminary explanation of the topic to prepare the discussion. Niessen (1977 p.66) claims that:

> "*Real groups start from a history of shared interactions in relation to the issue under discussion and thus have already developed forms of common activities and underlying patterns of meaning*".

The method does have weaknesses, for instance, the limited number of questions it is possible to address and the problems of taking notes during the interviews. Patton (*op.* cit) suggests the use of two interviewers, one who focuses on note taking, while the other manages the interview and the group. This was not an option for me as mine was a single researcher study, plus some participants did not wish the

interviews to be recorded; therefore, at the end of the interview / discussion, the participants were asked to respond to three questions by writing down the answers.

The teachers came to the school in which I worked to be interviewed at the end of a school day. Being mindful that these were volunteers giving up their own time at the end of a day's work, each interview lasted about 40 minutes to one hour. To protect the anonymity of participants, a pseudonym was allocated to each of the teachers. As the interview began, teachers were thanked for giving up their time to take part. They were reminded that they had previously completed the questionnaire and that the purpose of the interview was to gain a deeper understanding of the pressures that affected teachers than had been possible with the questionnaire.

Three questions were asked to add further detail to the results of the questionnaire. The questions were "*Can you complete the following statement as it applies to you. Stress is…….? Do you experience stress at work and if so what is it you find most stressful about the job? What measures do you take to relieve stress?* The teachers listened to each other and interacted well. They appeared at ease and body gestures such as nodding and smiling showed a degree of mutual support and empathy with what others were saying. There appeared to be a degree of consensus among the participants in each group. During the discussions there was no need to encourage quieter individuals to participate as everyone had something to say, which arguably, may have been the reason the participants agreed to take part. They may have felt there was something "in it for them", in terms of being given an opportunity to voice their concerns in a context of confidentiality, which had been established at the start

of each meeting. On the other hand, there was the potential for a group who knew each other well for the dialogue to develop into irrelevant chatter when discussing stressful incidents. However, being conscious of the limited time available for the interview, when this occurred I took control to bring the discussion back into focus.

5.9   Analysis of data

5.9.1   *Questionnaire*

Quantitative data analysis is regarded by Cohen et al (2007, p.501) to be a powerful research tool with strong links to positivist traditions, but since I had chosen to adopt a mixed method approach to the gathering and analysis of data, this presented no conflict for me. This form is often associated with large-scale research, but can also be useful in smaller-scale research which has generated numerical data. The computer software, Statistical Package for Social Science (SPSS) and Microsoft Excel were used in the numerical analysis of the data, which had been pre-coded prior to the distribution of the questionnaires. A nominal scale was used to categorise demographic data collected in section 1 of the questionnaire and an ordinal scale to measure data from the rating scales. The stress score for each respondent was calculated using the mean and standard deviation for each variable.

The questionnaire contained four open-ended questions which generated a small amount of data for qualitative analysis. A simple, straight-forward general approach using thematic coding was used to analyse the data. In direct response to the open questions, particular reasons for a preferred career pathway were identified and grouped together into themes for the first three questions (Appendices 16 – 19). The

Responses to the fourth open question were grouped together in relation to CPD themes (Appendix 20).

5.9.2 *Group interview analysis*

The fact that respondents wrote down their answers at the end of the session meant that content analysis could be applied to the data. Since there was a relatively small amount of data, this process was done manually. The questions in the group interviews were related to the overall aim of the research. Participants were asked to define stress as it applied to them; to identify personal sources of stress; and to describe any measures they took to alleviate feelings of stress. There is no universal framework for the analysis of qualitative data (Robson, 2011, p.466) and while acknowledging the subjectivity of the analysis and reporting processes, Cohen et al (*op.cit.* p.462) posit that the process used should be guided by fitness for purpose.

Robson (2011, p.474) describes thematic coding analysis as a generic approach to the analysis of qualitative data that can be used as a realist method that "*reports experiences, meanings and the reality of participants*". Since the concept of feelings of stress was the topic being investigated, this approach to analysis appeared to fit the purpose in the current study. Creswell (2003, p.190) describes the process of qualitative data analysis as making sense out of text and images. Miles and Huberman (1994, p.9) describe "*a fairly classic set of analytical moves*" when they advise giving labels to chunks of words and phrases identified as items of initial interest in the data. It is an ongoing process entailing continual reflection throughout, adding comments alongside the data when reading through. Creswell

(*op.cit*. p.191) states that the researcher needs to go beyond generic approaches in order to "*tailor*" the data analysis to specific types of qualitative research approaches. Regardless of the differences in the processes and the terms used in various types of research designs, Creswell suggests that an explanation of the analytic steps taken in qualitative inquiry should be made explicit.

The use of coding plays a central role in qualitative analysis. Gibbs (2007, p.38) describes the process in simple terms, stating that coding is how you classify what the data being analysed are about. It entails identifying and recording one or more pieces of text or other data items that in some way are illustrative of the same theoretical or descriptive data. Several pieces of text are commonly identified and linked with a name for that concept – the code. All text that is identified as relating to the same concept is coded to the same name. Coding is followed by grouping the initial codes into a smaller number of loosely defined themes (Robson, 2011, p.474) which "*capture something of interest or importance in relation to your research question(s)*".

Prior to the investigation of common factors between respondents, analysis of individual narratives was attempted to identify and describe experiences of stress. Pseudonyms were allocated to the participants to guarantee anonymity, and the accounts were typed into the computer by myself, as a means of getting to know the data and to obtain a "*general sense*" (Creswell, *ibid*.p.191) of what the participants were saying. All the accounts were read again and at this stage notes were made as general impressions were formed, for as Robson (2011, p.474) cautions "*ideas will*

always come, but they can very easily go and be lost unless you note them down".
The advice of Tesch (1990, p.142-145, as cited by Creswell, *ibid.* p.192) provided a
useful detailed description of the next steps to be taken in the data analysis.

First, one then several more accounts were read through while I made notes about the
meanings that were construed in the accounts. Next, a list of topics that appeared
was used to code and label the data; codes with the same label were grouped into
themes which then became the basis for further data analysis and interpretation,
continually asking what seems to go with what as initial impressions were elaborated
on and rechecked (Robson, 2011, p.473). This process was repeated with all
participants' responses which resulted in several new categories and codes emerging
as major themes and sub-themes appeared. The key codes for the data analysis were
determined on the basis of the research questions and the literature review and can be
seen in appendices 7 – 14. Time was taken over this process as coding and the
development of a thematic framework is central to building an understanding of
one's data.

5.10   Ethics

Initial approval for the study was sought and obtained from the research ethics
committee of the university at which I was studying. The main elements in the
ethical field that should be addressed by researchers are: gaining access to the
research setting; informed consent; voluntary participation; confidentiality and
anonymity; fairness and practices consistent with these (Cohen et al 200, p.51). A
request to carry out the research was made in writing to the education department of

the local authority in which the research would take place; and a copy of the questionnaire was attached. Permission to carry out the research was granted with the understanding that the headteachers of the schools involved had the final say. A copy of the permission letter from the local authority had to be attached to the letter to the headteachers to make them aware of this proviso (Appendix 1).

Informed consent consists of informing respondents of any facts that might be likely to influence their decision to participate in the research. The letter accompanying the questionnaire (Appendix 2) stated my position as a teacher studying for a higher degree in education and outlined the area of research. The fact that the initial research method employed was a questionnaire gave teachers the opportunity to be involved, or not, right at the beginning; and respondents could make a personal choice of whether or not to answer each question. The covering letter did not mention that the topic under investigation was occupational stress as this may have created some bias; however it was evident from the rating scales in the questionnaire that this was what was being measured.

The use of group interviews later in the study also involved participants volunteering to take part. Teachers were approached directly for this part of the research, but there was no question of teachers being coerced; however, as previously acknowledged, the participants were colleagues, which may have been an influence. The fact that I knew most of the interviewees quite well did not seem to pose a problem in the interviews. This may have been since they were conducted as a group, the interaction between me and the interviewees was perhaps less intense as it

may have been in a one-to-one meeting, as the participants focussed on each other, listening and responding to their comments, rather than on me. There was no question of a disparity of power relationship between me and the interviewees as all were qualified teachers and as such had equal status. The fact that teachers agreed to the group interviews might be indicative of a positive relationship and trust that had built up over a period of time, not just between me and the teachers, but between the teachers themselves.

Several teachers when asked, declined the invitation to take part in the interviews, which supports the contention that the teachers were able to exercise personal choice. As the interviews were conducted within a group setting, where there was evidence of empathy and consensus, and the teachers had already completed the questionnaire so were aware of the topic of the interview for which they had volunteered, it was not considered necessary to offer a post interview debriefing. Questionnaire and interview responses were held securely and were not made available to others. Data lifetime was not discussed either in the questionnaires or in the interviews, but in accordance with the institution's ethical policy, data will be destroyed after the completion of the research.

The covering letter to the questionnaire gave an assurance of confidentiality so the rights of the individuals were not compromised. Anonymity in relation to me could not be totally observed as I worked in the same school as nine of the respondents and despite enclosing a stamped addressed envelope, some teachers chose to return the questionnaire directly to me. The covering letter did however guarantee that no

individual or establishment would be identified in the thesis or to any other body. The questionnaires had been coded by school. This coding was visible on the bottom right hand side of the questionnaire. The reason for the coding was to alert me to a non-response rate from individual schools and enable me to send out a follow-up letter. An approximation of the time required to complete the questionnaire was given, participants were thanked in advance for their co-operation and my email address was included if anyone wished further information.

Students who carry out research as part of a postgraduate degree (just like other kinds of researchers) have an obligation to the research community not to jeopardise the reputation of the research community or to spoil the opportunity for further research in institutions. From an ethical perspective, for both the participants and the research community I have tried to attain rigour in the design, conduct, analysis and reporting of the research undertaken (Cohen et al, 2007, p.62).

5.11   Validity, reliability and generalisability

Validity is a fundamental requirement for both quantitative and qualitative research (Cohen et al, 2007, p.132; Denscombe, 2003, p.97). Traditional concepts of validity taken from positivist approaches were based on the premise that the instrument for data collection did in fact measure what it claimed to measure. During the past 50 or so years, with the growing acceptance of the qualitative interpretivist / constructivist research paradigm as a viable alternative to a positivist quantitative paradigm, there has been much debate by researchers regarding the controversial area of validity,

which has no set definition, but has a diversity of ideas that may seem confusing to the inexperienced researcher.

Cohen et al. (*ibid*, p.135) draw on the opinion of several researchers when determining the concept of validity in qualitative research. Maxwell (1992) cautions against qualitative researchers working within a positivist agenda that argues for the need of research to demonstrate, inter alia, con-current, predictive, criterion-related validity. He disputes the suggestion that the positivist concept of validity be replaced with the notion of authenticity and favours, instead, the suggestion that *understanding* is a more suitable term than *valid* in qualitative research. Maxwell (*op.cit.*) claims that as they are part of the researched world, researchers cannot be totally objective. Participants' perspectives are as valid as those of researchers and the researcher's task is to reveal these. In this case, validity then becomes a matter of accounts, not data or methods, and it is the meaning that participants give to data and references drawn from the data that are important.

Blumenfeld-Jones (1995) uses the term "fidelity" to convey the message that it is the responsibility of the researcher to be as honest as possible to the self-reporting of the respondents. Agar (1993, cited in Cohen, et al, *op.cit)* takes this argument further, by claiming that in qualitative data collection, the intensive personal involvement and in-depth responses of individuals provide a sufficient level of validity and reliability. The counter argument to this view (Hammersley, 1992, p.144; and Silverman, 1993, p.153) states that these are insufficient grounds for validity and reliability and that no individuals have a privileged position on interpretation. Silverman (1993) asserts

that while immediacy and authenticity make for good reading, ethnographic research must employ more rigorous notions of validity and reliability. Acceptance of this proposal would involve moving beyond selecting data that simply fitted a predetermined notion of the phenomena or that were deemed to be spectacularly interesting. The claim is made that data selected must be representative of the sample in the study and must address content, construct and concurrent validity. Below is an account of several models of validity which have been used to establish the credibility of the current research.

Descriptive validity (Maxwell, *op.cit.*) refers to the factual accuracy of the account. That research aims to be accurate is a core belief and a criterion that helps to establish research findings as better and more worthwhile than common sense, speculation or casual kinds of investigation (Denscombe *op. cit.*). Validity and reliability are at the centre of issues related to accuracy. Validity is generally concerned with the accuracy of the questions asked, the data collected and the explanation offered. Although it has connotations to positivist approaches to reporting what is "true", "real" and "accurate", the majority of qualitative researchers wish to defend their work in terms of its validity. The accuracy of determining whether the research has asked the right questions and used the right indicators relates to content validity and construct validity. Content validity refers to how fairly and fully the data collection tools cover the domain or items that they claim to cover. Cohen et al (*op. cit.*) posit that it is unlikely that each area for study will be able to be covered in its entirety due to time constraints and willingness by respondents to complete a lengthy questionnaire. The researcher then is required to ensure that the

elements chosen in the study are a fair representation of the wider issue being investigated; and that the elements chosen for their study are themselves addressed in depth and breadth.

Constructs are abstract in nature and it is essential that the researcher's definition and understanding of the construct being investigated is similar to that which is generally understood by the population. In this study, I have tried as far as possible to ensure content and construct validity. The first step taken to ensure the use of an appropriate questionnaire was to source one that had been constructed, tried and tested in previous research by two renowned researchers, who might be considered as individuals who were able to give an "*expert opinion*" (Denscombe, 2002, p.102) on the study of stress. Since this questionnaire had been formulated in 1993, I updated the stress factors to take into account factors related to the policies introduced by the Scottish Parliament and also to take into account any contemporary factors that may have been relevant. I did this by using information gathered from a group of teachers working for the same local authority as the teachers in the study. The new questions were added to the stressor item-bank and a test for internal consistency of the stress factors was applied to the questionnaire (5.5.3). Prior to beginning the research, I asked a group of seven individuals with a variety of occupational backgrounds, to define the concept of stress (Appendix 4). Each person indicated a negative response to the concept. In the study, the first question in the interviews asked respondents to give a definition of stress. Responses were consistent with the definition of stress as articulated by the pre-study group and also with the conception expressed in a wide literature search.

Descriptive validity is allied to Blumenfeld-Jones' (1995) idea of "truth" in research, reporting what actually happened. In order to establish truth in this study, I have attempted to make the audit trail of the research process clear. From the beginning of the study and throughout, I have clarified my personal position in the research environment and how this and any possible bias or assumptions might have impacted on the study.

Interpretive validity (Maxwell *op.cit.*) is the ability of the research to catch the meaning and interpretations that the data have for the participants themselves. It is allied to Blumenfeld-Jones' notion of "fidelity". Throughout the process of data analysis, I have attempted in my interpretations to be as true as possible to the meanings of the respondents. Due to work commitments at the time for both myself and respondents, it was not possible to obtain verification of accounts from all interviewees, but I did obtain verification of the overall interpretation from four individuals. I felt this would be acceptable as all were part of one or other of the interviews and were party to the discussions.

To demonstrate concurrent validity, the data gathered by using one form of measurement must be in agreement with the data gathered by a different measure. This model of validity is related to triangulation. Triangulation is the process of using two or more methods of data collection or data analysis. It is used in the social sciences to explain more fully the complex nature of human behaviour by studying it from more than one perspective, for example, by using both quantitative and qualitative data. Triangulation is a powerful method of demonstrating concurrent

validity, particularly in qualitative research (Campbell and Fiske, 1959, cited in Cohen et al, *op.cit.* p.141). In this study, triangulation was achieved by using a questionnaire and group interviews to collect data from the teachers. Investigator triangulation was not possible as only one person carried out the doctoral research.

Reliability relates to the method of data collection and the issue of whether the research instrument is neutral and consistent, in that it does not bias the results due to the method of collecting the data, and that it would produce consistent results each time it is used (Denscombe, 2002). The questionnaire used in the research itself is reliable in that it has been subjected to statistical tests and in a similar form it has been used by very experienced researchers whose research aims were comparable to those in the current study. However, this study was undertaken at a particular time in the history of teachers in Scotland, i.e. following the implementation of education policy introduced by a new Scottish government. Given these circumstances, there is no guarantee the same results would be obtained in different circumstances. This point introduces the question of generalisability of the findings.

As stated earlier (section 5.5), the sample population was a convenience sample and teachers had great latitude in whether to participate, or not, in the study. Without asking directly, one cannot know the reasons why those who chose to do so, participated. This is a potential cause for bias in the study and prevents claims for generalisability. A further issue is related to the topic of the inquiry, occupational stress and the self reporting thereof. Stress is a very subjective phenomenon which is affected by individual personality characteristics and schools are very different

institutions in terms of location and leadership, thus the same study in a different

location may have produced different results.

5.12   Delimitations and limitations of the study

The study was confined to potential participants in the secondary and primary

schools in two learning communities in a specific area in a major Scottish city. The

education authority imposed conditions for access to the teaching population in the

schools by insisting that headteachers had the final say on whether access to the

school would be granted. This factor possibly led to the study being restricted to

teachers in one secondary school and five primary schools.

It is acknowledged that this is a small-scale study whose findings may not be

representative of the teaching population in general. A further limitation is that the

convenience sampling procedure used, decreases the generalisability of the findings

and the results obtained will not be generalisable to all areas of teaching. Due to

teachers choosing, or not, to participate in the questionnaire and the group

interviews, sampling bias may have occurred since those who did not respond may

have done so through disinterest, lack of time, lack of stress or some other unknown

reason. The fact that no teachers volunteered to keep an occupational journal

resulted in the second data collection being changed to the use of interviews

involving a small number of participants, two of whom did not wish their

conversation to be recorded.

Additional limitations were imposed by my position, who as a member of the teaching community, worked with nine of the respondents and was well known to others. Some studies (e.g. Travers and Cooper, 1993) on occupational stress used additional data collection techniques involving asking respondents to stipulate physical effects of stress, for example, frequency of absence, types of illness, increase in smoking and alcohol intake. Due to my relationship with the respondents, I did not feel it would be ethical to ask such questions in a doctoral study, which it might be said, was undertaken for my professional and personal advantage.

5.13   Summary

The chapter presented the justification for a mixed-method approach to data collection, the aim of which was to use the strengths and minimise the weaknesses of both while placing equal importance on both methods. A questionnaire was used to collect data from the whole study sample and was followed by further accounts gathered from a small number of within-sample respondents as a means of expanding and corroborating the evidence obtained from the questionnaire. The chapter provided information on how the participants were recruited and issues related to access to the sample. It has given an account of the approach to data analysis and the steps taken to establish credibility of the research. The study now proceeds to Chapter 6 where the results of the empirical study are outlined.

Chapter 6   Findings

6.1   Introduction

The purpose of this chapter is to report the findings from the questionnaire which addressed the main research question, namely, to establish what evidence there is from teachers of occupational stress in their work in relation to policy initiatives and change; and the associated sub-questions: what the origins and causes of reported stress are, particularly in relation to policy change and traditional stressors reported in previous research. The chapter will also report the findings from the group interviews which addressed a sub-question: what kind of experiences of stress appear in teachers' accounts?

One of the objectives of this mixed-method study was to explore the extent to which there is evidence of occupational stress in the study population, thus the questionnaire results are examined first. To provide a coherent pathway through the findings, the data gathered from the closed questions will be presented first, starting with the demographic data from section 1 and continuing through subsequent sections 2 – 11 which contain the independent variables.   Analysis of data generated from the open questions will be presented next, followed by analysis and findings from the group interviews.

6.2   Analysis of the questionnaire

The Statistical Package for Social Science (SPSS) for quantitative data analysis (version 16) and Microsoft Office Excel 2003 were used in the numerical analysis of

data generated from the closed responses to the questionnaire, which had been pre-coded prior to distribution.

Cohen et al (2007, p.506) and Creswell (203, p.157) advise measuring the internal consistency of the instrument used for data collection, even, or especially if a previously validated instrument is used, as modifying the instrument can affect validity and reliability. This process has been previously summarized in 5.5.3.

The data were entered into SPSS using a nominal scale to categorise demographic data and an ordinal scale to measure data from the rating scales. To ensure that data were entered accurately the process was repeated twice by myself and then checked by a third party. Since those who have avoided filling in some responses may have a different view from those who did respond, signal codes for missing data were allocated as follows: "don't know" responses were coded as 100; "did not respond" was coded as 999; and "not applicable" was coded as 101. To explore the data set and due to the nature of the phenomenon being studied i.e. self reports of stress, mainly descriptive statistics were used in the analysis. The stress score for each respondent was calculated using the mean and standard deviation for each independent variable.

6.2.1 Structure of the questionnaire

The questionnaire was organised into twelve factors as follows;

1. Demographic

2. Pupil / teacher interaction

3. Management / structure of the school

4. School environment

5. Changes taking place within education

6. Appraisal of teachers

7. The concerns of management (applicable solely to school management team)

8. Workload

9. Status/ promotion opportunities

10. Ambiguity of teacher's role

11. Relating to National Priorities and Local Authority Initiatives

12. CPD

6.2.2   Quantitative figures for closed questions

Part one of the questionnaire deals with the demographics relating to the respondents.

Part two is the self- report of degrees of pressure felt by respondents, which are

linked to areas of traditional pressure as highlighted in previous studies including

those by Travers and Cooper (1993, 2001); the reports of Scottish studies by

Johnstone (1993) and Wilson (2002); and questions that were formulated following

information gained from an open question related to pressures in teaching,

administered to a representative group of teachers outwith the study population (5.5.3

and Appendix 5).   Part three of the questionnaire is a report of teachers' personal

feelings / opinions related to national and local policy change.

6.2.3   Part 1 - Participants

After a follow-up letter to schools to encourage responses, the total number of

questionnaires received was fifty-six, giving a response rate of around 38 % which is

within the norm for questionnaire surveys (Gillham, 2000). One questionnaire

received was partially completed as far as section 6, and has been included in the

results for the completed sections only.

Gender and school sector is outlined in Table 2, below. Thirty-three per cent ($n =$

18) of respondents were secondary teachers and sixty-eight per cent ($n = 38$)

including the six teachers studying for a higher degree, were primary teachers.

Twenty-seven per cent of respondents ($n = 15$) were male, eleven of whom worked

in the secondary sector and seventy-three per cent of respondents ($n = 41$) were

female, seven of whom worked in the secondary sector.

Table 2: The gender and school sector of the respondents

Gender	Overall %	Primary %	Secondary %
Male	27	26.6	73.6
Female	73	83	17

Years in teaching: Table 3, below summarises the teaching experience of

participants. The majority ($n = 21$) were experienced teachers with more than 20

years of service, while about twenty per cent ($n = 11$) had been teaching for 5 years

or less.

Table 3: Years in teaching

Years of teaching experience	%
0 – 5	19.6
6 – 10	21.4
11-15	10.7
16- 20	10.7
More than 20 years	37.5

Age range: the majority of teachers were more than 30 years of age. At 34% of the sample population, the largest age group was teachers aged 40 – 49 years when, in 2005 the percentage of teachers in that age group nationally was 29.2%. About 16% of the sample population were under 30 years of age. It would be unfounded to conclude that there was a lack of younger teachers in the Learning Communities since there is no information on those teachers who did not respond to the questionnaire (Figure 1 below).

Figure 1: Age range

age group
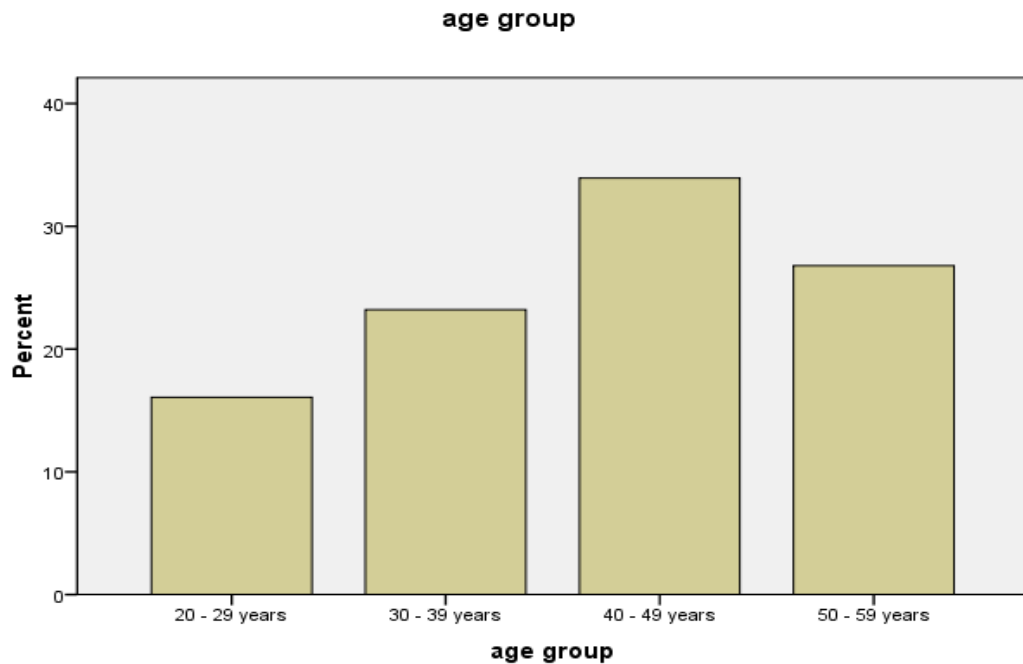
Post in school: Figure 2, below, shows the designation of respondents in the year in which the study took place.

- Thirty-seven respondents (66.1%) were mainscale teachers

- Ten respondents (17.9%) were principal teachers

- Two teachers were deputy heads

- Three teachers were headteachers

- One respondent was an ex-principal teacher on a conserved salary

- Two teachers worked as cluster ASL (additional support for learning) teachers

- One teacher covered McCrone time while she shared her class with a probationer

154

In relation to principal teacher post, none of the principal teachers employed in the secondary sector apparently considered themselves part of the senior management team, and did not respond to the questions in factor 7, which were related to concerns of management. All principal teachers in the primary sector responded to this factor.
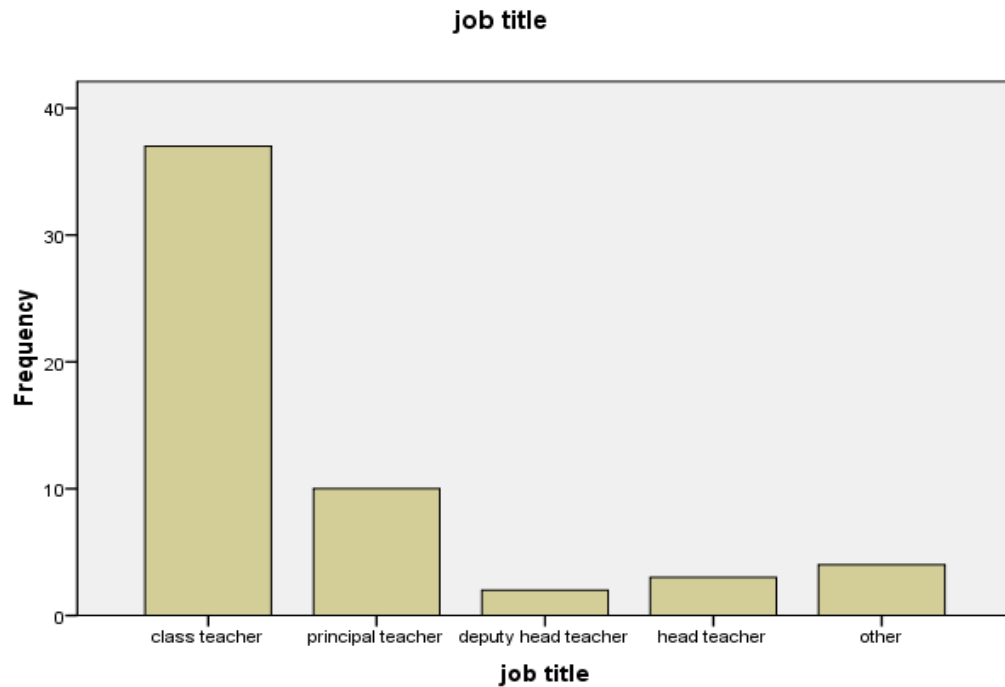
Figure 2: post in school

Job status of respondents is displayed below, in table 4. Forty-two (75%) respondents held a full-time permanent post. Seven (12.5%) teachers were employed on a permanent job-share basis. Three teachers (5.4%) held a full time permanent supply post and four respondents (7.1%) were probationers.

Table 4: Job status

Job status	%
Full time permanent	75
Job share permanent	12.5
Full time supply	5.4
Probationer	7.1

The stage in school for which repondents were responsible is displayed in figure 3, below. Teacher**s** with responsibility for a single class in the primary sector form the largest group among the respondents. Altogether thirty-one teachers (55%) were employed across the mainstream classes in the primary sector, with a further one teaching in a nurture class, plus two teachers who covered non-class contact time (NCC). Teachers with class responsibility in the secondary sector form the second largest group, sixteen teachers (29%). Two depute heads held responsibility either for younger or older pupils in their school, and three headteachers held responsibility for the whole of the schools which they managed.

for which stage in school are you currently responsible
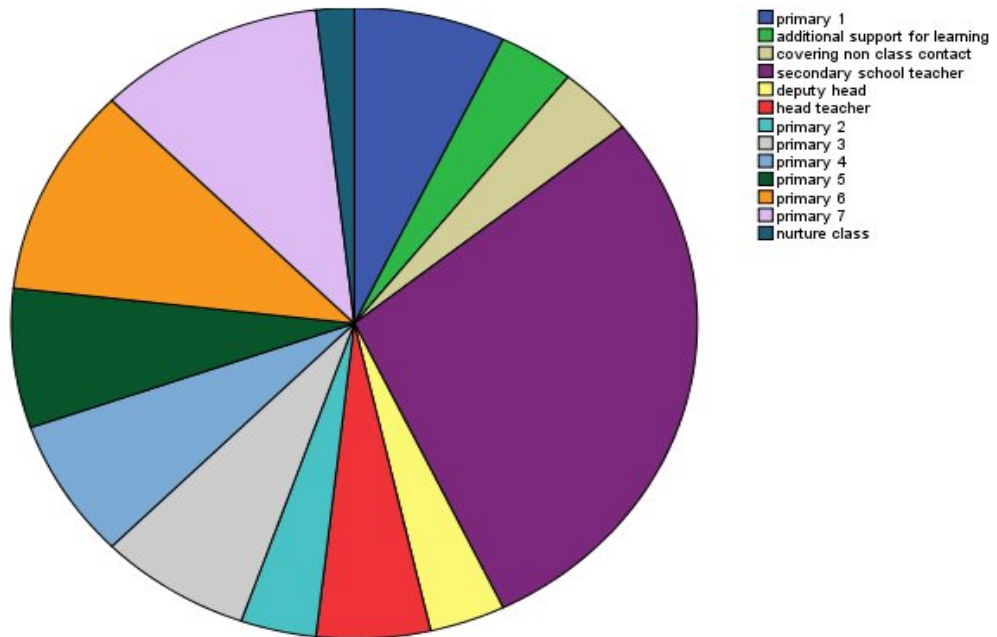
Figure 3: Stage in school for which respondents were responsible

6.2.4   Summary of demographic section

A total of 50 teachers were investigated from five schools in a major Scottish city

plus six teachers from the central belt who were studying for a higher degree at a

university in that city. The demographic profile of the respondents in the sample is

broadly representative of the profile of the teacher population in Scotland in 2005.

In terms of gender, the majority of teachers 73% (*n=41*) were female and 27%

(*n=15*) were male, reflecting the national profile for 2005, which was 75% female

and 25% male. This was to be expected as the majority of schools in the study were

from the primary sector, where staff is predominately female (Matheson, 2007).

In terms of teaching grade 5.4% (*n=3*) were headteachers, 3.6% (*n=2*) were depute heads, 17.9% (*n=10*) were principal teachers and the remainder 73.2% (*n=41*) were mainscale teachers. The years the teachers had been in the teaching profession ranged from seven months to more than 20 years; with the majority 37.5 % (*n =21*) having taught for twenty years or more.

Despite the relative similarities between the sample population and the actual demographics of the teaching population in Scotland, it is acknowledged that the findings from this study cannot be generalised to the wider teaching population as the numbers in the sample are too small and as previously stated, the sample was a convenience sample and the participants were volunteers, and the views of the majority of teachers in the Learning Communities are unknown.

6.2.5   Part 2: self-reports of stress experienced from traditional stressors

The overall number of respondents was 56, however one respondent completed sections 1 – 6 only, possibly having misunderstood the instructions at the beginning of section 7; therefore, the potential total number of respondents for sections 7- 12 is 55.

Factor 2: pupil / teacher interaction

The mean score and standard deviation (SD) which takes account of non-responses and makes this a more reliable method of comparing variables with each other, were used to show which variables teachers reported caused them stress. Calculating the mean score of each variable showed that interactions which caused teachers the most stress were those with a mean score closest to 4, while the interactions that caused

teachers the least stress were those closest to 1. The mean and the standard deviation were calculated using the statistical package SPSS.

Table 5: stress from pupil / teacher interaction

variable	N	Minimum	Maximum	Mean stress score	Std. Deviation
2.7 pupils don't value education	56	1	4	2.71	.948
2.8 witnessing increasing aggression between pupils	56	1	4	2.64	.923
2.9 lack of parental backup on discipline	56	1	4	2.61	1.021
2.2 confrontation with pupils	56	1	4	2.52	1.128
2.3 pupils answering back	56	1	4	2.50	.972
2.1 verbal aggression from pupils	56	1	4	2.41	1.075
2.11 keeping whole class fully engaged	56	1	4	2.41	.949
2.4 maintaining discipline	56	1	4	2.38	.926
2.5 pupils challenge judgement	56	1	4	2.23	.972
2.6 basic behavioural problems	56	1	4	2.21	.909
2.12 lack of management support in discipline	56	1	4	2.14	1.086
2.10 physical aggression from pupils	56	1	4	2.12	1.237
Valid N (listwise)	56				

1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

The three variables with a mean score closest to 4 are variable 2.7 with a mean stress score of 2.71 (SD = .948); variable 2.8, with a mean stress score of 2.64 (SD = .923) and variable 2.9, with a mean stress score of 2.61 (SD =1.021). The three variables whose mean is nearest to 1 are variable 2.10 with a mean score of 2.12 (SD = 1.237); variable 2.12 with a mean score of 2.14 (SD = 1.086) and variable 2.6, whose mean score is 2.21 (SD = .909). The fact that each mean stress score was greater than 2.00

indicates that each variable in this factor was a source of pressure for the majority of respondents.

Overall, about 89% (*n = 50*) of respondents reported feeling stressed by *dealing with pupils who do not value education;* 89% (*n=50*) also reported feeling stressed from *witnessing increased aggression between pupils*; and about 86% (n=48*)* reported feeling stressed from *lack of parental backup on discipline.* About 5% (*n=3*) of respondents reported the highest level of stress for all three high stressors. All of these respondents were male. One was part of senior management in a secondary school who was more than 50 years old and who had been teaching for more than 20 years. The other two respondents both worked in the primary sector and both were between 40 and 49 years of age. One had been teaching for between 11 and 15 years and at the time of the study was responsible for teaching primary 7; the other had been teaching for between 6 – 10 years and at the time worked in primary 6. Conversely, about 20% (*n=11*) of respondents reported little or no stress from these variables.

The highest possible individual stress level score for this factor is 48. About 9% (*n=5*) of respondents reported a level of between 43 and 48, with one respondent reporting that he felt stress at the highest level for every variable in the pupil / teacher interaction factor. This male teacher, respondent 25 who had a mean stress score of 4, was 40 – 49 years old, had been in teaching for between six and ten years and at the time of the study worked in primary 6.

Factor 3: **management and structure of the school -** the results are summarised in

Table 6, below

Table 6: Stress from management and structure of the school

Descriptive Statistics

Variable	N	Minimum	Maximum	Mean stress score	Std. Deviation
3.3 conflict between needs of class and views of senior manage	56	1	4	2.41	1.058
3.7 coping with colleagues not fulfilling responsibilities	56	1	4	2.11	1.003
3.6 poor staff communication	56	1	4	2.09	1.116
3.2 lack of participation by staff in decision making	56	1	4	2.07	.988
3.9 too much responsibility for curriculum development	55	1	4	2.02	.933
3.5 individual staff deviating from school policy	56	1	4	2.02	.963
3.4 lack of support from HT	55	1	4	1.85	1.044
3.1 the hierarchical nature of school	56	1	4	1.84	.968
3.8 too little responsibility within the school	54	1	4	1.78	.965
3.11 too few opportunities to make own decisions	56	1	4	1.70	.784
3.10 professional rivalry among staff	56	1	4	1.57	.783
3.12 staff conflict over shared responsibility for preparing reports for parents	55	1	4	1.47	.690
Valid N (listwise)	53				

1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

The three variables with mean scores nearest to 4 are variable 3.3, *Conflict between*

the needs of the class and the views of senior management; variable 3.7, *Coping with*

colleagues who are not fulfilling their responsibilities and variable 3.6, *Poor staff communication*, indicating the variables in factor 3 that teachers reported caused them most stress. There were several questions in this section which some respondents did not answer. Variable 3.12, *Staff conflict over shared responsibility for preparing reports for parents*, which cluster support teachers were not involved in; and variable 3.9 *Too much responsibility*, again an aspect of school life which did not involve cluster support staff.

In summary, 75% (n = 42) reported feeling stressed from Conflict between the needs of the class and the views of senior management; about 66% (n=37) of teachers reported feeling stressed from Coping with colleagues who are not fulfilling their responsibilities; and about 57% (n=36) of respondents reported feeling stressed from Poor staff communication. Only one respondent reported feeling stress at the highest level from all three stressors. This female class teacher was between 40 – 49 years old, had been teaching for between 11 – 15 years and at the time of the survey taught in a primary 7 class.

Factor 4: school environment – the results for an overall stress score are

summarised in table 7, below

Table 7: Stress from the school environment

Descriptive Statistics

Variable	N	Minimum	Maximum	mean	Std. Deviation
4.3 class size	56	1	4	2.34	1.225
4.4 the poor physical condition of the work environment	56	1	4	2.29	1.107
4.2 poor staff/pupil ratio	56	1	4	2.29	1.140
4.1 having to teach in cramped classroom	55	1	4	2.11	1.149
Valid N (listwise)	55				

 1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

With a mean score of 2.34 (SD = 1.225) *Class size* was the variable in section 4

which teachers in the study reported caused them most stress. The variable which

teachers reported caused them least stress in this section with a mean score of 2.11

(SD = 1.149) was variable 4.1, *Having to teach in cramped classes*. Almost two-

thirds of the sample (*n=37*) reported feeling stress from issues related to *Class size;*

about 29% (*n=16*) reporting feelings of stress at the highest level. About 41%

(*n=23*) reported feeling no stress from variable 4.1, *Having to teach in cramped*

classes.

The highest possible overall stress count for section 4 is 16. three respondents reported a stress score of 16 (mean – 4), while nine respondents reported a stress score of 4 (mean = 1).

Factor 6: appraisal of teachers – items that were in place before the policies under discussion were introduced – the results for a mean stress score for the selected items are summarised in table 8, below

Table 8: Stress from selected traditional stressors associated with appraisal of teachers

descriptive Statistics					
Variable	N	Minimum	Maximum	Mean	Std. Deviation
6.5 Inspection by HMIE	56	1	4	3.00	5 variables1.079
6.12 The paperwork associated with assessment	56	1	4	2.80	.796
6.1 Demands from parents for good results	56	1	4	1.93	.828
6.14 Having to comply with senior school management	55	1	4	1.85	.911
6.4 Attending parents' evenings	56	1	4	1.75	.745
Valid N (listwise)	55				

1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

The two variables in this section that teachers have reported caused them most stress, with a mean stress score of 3.00 (SD = 1.079) are 6.5 *Inspection by HMIE*; and with a mean stress score of 2.80 (SD = .796), 6.12 *The paperwork associated with*

assessment. Overall about 89% (*n=50)* of respondents reported feelings of stress associated with *Inspection by HMIE*, 48% (*n=26*) reported stress at the highest level. About 93% (*n=52*) of respondents reported feelings of stress related to *The paperwork associated with assessment*. On the other hand, about 41% (*n=23*) reported no stress from *Attending parents' evenings* and about 43% (*n=24*) reported no stress from *Having to comply with senior school management*.

The highest possible score for this truncated section was 20. One respondent reported a stress score of 18 (mean = 3.6) while three respondents reported a stress score of 6 (mean = 1.2). The profile of those teachers who reported a very low stress score, revealed that two were supply teachers and the other was a cluster support teacher.   It might be argued that these teachers were not as involved in parents' nights or inspection by HMIE or assessment to the same extent as their full-time class committed colleagues, therefore, did not experience the same pressures from appraisal.

Factor 8: workload – excluding items that have been introduced after 2000 – the results for the mean stress score of an abridged factor are summarised in table 9, below

Table 9: Stress from an abridged selection of variables from workload

Descriptive Statistics

Variable	N	Minimum	Maximum	Mean	Std. Deviation
8.1 Time pressures	55	1	4	3.20	.803
8.3.Too much work	55	1	4	3.11	.786
8.7 Paperwork	55	1	4	3.02	.871
8.4 Time management	55	1	4	2.89	.936
8.7 Assessment	55	1	4	2.87	.982
8.2 Long hours	55	1	4	2.84	1.014
8.6 Administration tasks	55	1	4	2.69	1.034
8.5 Personal life interferences	55	1	4	2.42	1.031
8.10 Deadlines for forward plans	55	1	4	2.33	1.001
8.11 Deadlines for standardised tests	55	1	4	2.18	.983
8.8 Assemblies/school shows	55	1	4	2.04	.881
Valid N (listwise)	55				

The results of the variables in factor 8 show that there are three variable with a mean
stress score greater than 3. They are 8.1 *Time pressures* with a mean stress score of
3.20 (SD = .803); 8.3 *Too much work* with a mean stress score of 3.11 (SD = .786);
and 8.7 *Paperwork* with a mean stress score of 3.02 (SD = .871). The stressors that
respondents reported caused them least stress within these variables were 8.8
Assemblies/ school shows, with a mean stress score of 2.04 (SD = .881) and 8.11
Deadlines for standardised tests, with a mean stress score of 2.18 (SD = .983).

Taking into account that the highest number of potential respondents is 55 for this
section, overall about 98% (*n=54)* of respondents reported feeling stressed by issues

related to *Time pressure*; about 41% (*n=23*) reporting feeling stressed at the highest level. About 98% (*n=54*) also reported feeling stressed from *Too much work*; about 34% (*n=19*) of respondents reporting feelings of stress at the highest level. About 96% (*n=53*) reported feeling stressed from *Paperwork*; about 34% (*n=19*) reported that paperwork caused them stress at the highest level. Twenty-nine percent of respondents (*n=16*) reported feeling no stress from work related to *School assemblies or shows*. However, although this variable caused the least amount of stress for respondents in this section, about 40% *(n=22*) reported feelings of stress at level 2. About 27% (*n=15*) of respondents reported that meeting *Deadlines for standarised tests* caused them no stress, about 39% (*n=22*) reported feelings of stress at level 2.

Altogether ten respondents reported feeling stress at the highest level for all top stressors in this section. The overall total possible score for this section was 44. Two respondents reported a score of 42 and one respondent reported a score of 41, while in contrast, one respondent reported a score of 11. Respondent 9 and respondent 29 both had a mean stress score of 3.81 and respondent 34 had a mean stress score of 3.72, while respondent 45 reported a mean stress score of 1.00 indicating the least amount of stress overall.

6.2.6   Summary of traditional stressors

The mean stress scores of all variables considered from the literature review to be traditional stressors were totalled. The mean stress score from these equated to 2.29. A summary of the 21 stressors which had a mean stress score of 2.29 or above are detailed in descending order in table 10 below.

Table 10: Traditional stressors with a mean stress score of 2.29 or higher.

Descriptive Statistics

Variable	N	Minimum	Maximum	Mean	Std. Deviation
8.1 time pressures	55	1	4	3.20	.803
8.3 too much work	55	1	4	3.11	.786
8.7 paperwork	55	1	4	3.02	.871
6.5 inspection by HMIE	56	1	4	3.00	1.079
8.4 time management	55	1	4	2.89	.936
8.7 assessment	55	1	4	2.87	.982
8.2 long hours	55	1	4	2.84	1.014
6.12 the paperwork associated with assessment	56	1	4	2.80	.796
2.7 pupils don't value education	56	1	4	2.71	.948
8.6 administration tasks	55	1	4	2.69	1.034
2.8 witnessing increasing aggression between pupils	56	1	4	2.64	.923
2.9 lack of parental backup on discipline	56	1	4	2.61	1.021
2.2 confrontation with pupils	56	1	4	2.52	1.128
2.3 pupils answering back	56	1	4	2.50	.972
8.5 personal life interferences	55	1	4	2.42	1.031
2.1 verbal aggression from pupils	56	1	4	2.41	1.075
3.3 conflict between needs of class and views of senior manage	56	1	4	2.41	1.058
2.11 keeping whole class fully engaged	56	1	4	2.41	.949
2.4 maintaining discipline	56	1	4	2.38	.926
4.3 class size	56	1	4	2.34	1.225
8.10 deadlines for forward plans	55	1	4	2.33	1.001
Valid N (listwise)	55				

1= no stress, 2 = some stress, 3= greater level of stress, 4 = highest level of stress

Forty-three percent (*n=9*) of the most stressful traditional variables are related to factor 8, workload and 38% (*n=8*) are related to factor 2, teacher / pupil interaction. Two factors are related to appraisal, one related to management / structure of the school and one related to the school environment.

6.2.7   Reported stress from variables linked to new policy

The next section of results gives the findings from variables which were identified as potential stressors following the implementation of policy.

Factor 5: Changes taking place within education – the results for an overall stress score are summarised in table 11, below

Table 11: Change taking place within education

Descriptive Statistics

variable	N	Minimum	Maximum	Mean	Std. Deviation
5.4 addressing policy on inclusion	56	1	4	2.84	1.041
5.1 constant changes taking place within the profession	56	1	4	2.79	.986
5.3 Lack of info on how changes are to be implemented	56	1	4	2.55	.971
5.6 The E.S. topics recommended by the Local authority	52	1	4	2.48	1.075
5.5 modifying teaching strategies to raise attainment	56	1	4	2.32	.897
5.2 The move towards a centralised/ national curriculum.	56	1	4	2.29	.967
Valid N (listwise)	52				

1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

Related to factor 5, the variables that caused most stress for teachers were 5.4,

Addressing policy on inclusion with a mean stress score of 2.84 (SD = 1.041) and

5.1, *Constant changes taking place within the profession*, mean stress score 2.79 (SD

= .986). The variables which respondents reported caused them least stress were 5.2,

The move towards a centralized/ national curriculum with a mean stress score of

2.29 (SD = .967) and 5.5, *Modifying teaching strategies to raise attainment* with a

mean stress score 2.32 (SD = .897).

Overall about 91% (*n = 51*) of respondents reported feeling stressed from addressing

policy on inclusion and about 89% (*n= 50*) of respondents reported feeling stressed

from the constant changes taking place within the profession. About 9% (*n=5*) of

respondents reported feeling the highest level of stress for both variables.

The highest possible score for reported feelings of stress for factor 5 is 24 = mean

score of 4. Eight respondents had a total score of 18 or above with a mean score of

3.0, 3.5, 3.66, 3.83 and 4. Respondent 24 reported a mean stress score of 4, having

reported stress at the highest level for each variable in the section. This class teacher

was female and had been in teaching for more than 20 years. At the time, she taught

in a primary 6 class. One teacher, respondent 30, reported the lowest mean stress

score of 1.00.   This male teacher was 40 – 49 years of age and had been a teacher for

1 year, in the secondary sector.

Factor 6: appraisal of teachers linked to new policy –The results of an overall

stress score are summarised in table 12 below.

Table 12: Appraisal of teachers linked to new policies

Descriptive Statistics

Variable	N	Minimum	Maximum	Mean	Std. Deviation
6.6 Undergoing an establishment review	56	1	4	2.55	.913
6.15 Feeling the need to continuously maintain high standard	56	1	4	2.46	.914
6.10 Having to achieve targets for national test results	56	1	4	2.41	1.075
6.13 Feeling the need to be accountable	56	1	4	2.36	.999
6. 11 Having to produce evidence of what has been taught and assessed	56	1	4	2.25	.939
6.17 The way national tests results are published	56	1	4	2.25	.919
6.16 Need to modify teaching strategies to raise attainment	56	1	4	2.14	.819
6.9 Process of annual school evaluation	56	1	4	1.91	.900
6.3 Having teaching appraised by other teachers	53	1	4	1.85	.928
6.8 Yearly staff review	56	1	4	1.84	.848
6.7 Academic pressure from within the school	56	1	4	1.84	.757
6.2 Monitoring by HT of performance in class	55	1	4	1.82	.905
Valid N (listwise)	53				

1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

The variables that teachers reported caused them most stress were 6.6 *Undergoing an establishment review* with a mean stress score of 2.55 (SD = .913); 6.15 *Feeling the need to continuously maintain a high standard* with a mean stress score of 2.46 (SD = .914); and 6.10 *Having to achieve targets for National Test results* with a mean stress score of 2.41 (SD = 1.075).

On the whole, about 89% (*n* = 50) of respondents reported experiencing stress from *Undergoing an establishment review*; about 86% (*n=48*) of respondents reported stress from *Feeling the need to continuously maintain a high standard*; and about 77% (*n=43*) of teachers reported feelings of stress related to *Having to achieve targets for national tests.* Two respondents reported feeling pressure at the highest level from all three variables.

Focussing on the opposite end of the scale on the variables which teachers reported caused them least stress, about 41% (*n=23*) of respondents attributed no stress to variable 6.2 *Monitoring by the head teacher.* This was not however the majority of teachers, as about 43% (*n=24*) teachers reported stress at level 2. A similar picture developed with variable 6.7 *Academic pressure from within the school* where about 39% (*n=19*) of respondents reported feeling no stress, but about 52% (*n=29*) of respondents reported experiencing stress at the second level.

Factor 8a: Workload linked to policy change – the results are summarised in table

13 below.

Table 13: Workload linked to new policy

Descriptive Statistics					
	N	Minimum	Maximum	Mean	Std. Deviation
8.15 Extra workload related to development plan	55	1	4	2.55	1.015
8.14 Pace of work to improve attainment	55	1	4	2.47	.940
8.13 Continuing professional development	54	1	4	2.43	.964
8.12 Deadlines for development work	55	1	4	2.29	.975
8.9 Participation in working parties	55	1	4	2.22	1.536
Valid N (listwise)	54				

1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

The variable in this section which teachers reported caused most stress was 8.15

Extra workload related to the development plan with a mean stress score of 2.25 (SD

= 1.015) and the variable that teachers reported caused them least stress was 8.10

Participation in working parties with a mean stress score of 2.22 (SD = 1.536).

Overall, about 82% (*n=46*) of respondents reported feelings of stress linked to the

extra workload related to the development plan. About 32% (*n=18*) of respondents

reported feeling no stress linked to *Participation in working parties.* However about

36% (*n=20*) of teachers reported feeling stress at level 2.

6.2.8 Summary of stressors with the highest mean stress scores

The mean stress scores of all variables considered to be linked to policy change were totalled. The mean stress score from these equated to 2.26. Fourteen variables had a mean stress score of 2.26 or above. An overall mean stress score was then calculated for both traditional stressors and those linked to policy change to find a mean average score across both sets of data. The new mean stress score used to compare the data was 2.5, therefore variables with a mean stress score of 2.5 or above from both traditional stressors and those linked to policy change would be considered high. These variables are set out in table 14, below.

Table 14: Traditional stressors and stressors linked to policy changes that have a mean stress score of 2.5 or above

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
8.1 time pressures	55	1	4	3.20	.803
8.3 too much work	55	1	4	3.11	.786
8.7 paperwork	55	1	4	3.02	.871
6.5 inspection by HMIE	56	1	4	3.00	1.079
8.4 time management	55	1	4	2.89	.936
8.7 assessment	55	1	4	2.87	.982
5.4 addressing policy on inclusion	56	1	4	2.84	1.041
8.2 long hours	55	1	4	2.84	1.014
6.12 the paperwork associated with assessment	56	1	4	2.80	.796
5.1 constant changes taking place within the profession	56	1	4	2.79	.986
2.7 pupils don't value education	56	1	4	2.71	.948
8.6 administration tasks	55	1	4	2.69	1.034
2.8 witnessing increasing aggression between pupils	56	1	4	2.64	.923
2.9 lack of parental backup on discipline	56	1	4	2.61	1.021
5.3 lack of info on how changes are to be implemented	56	1	4	2.55	.971
6.6 undergoing an establishment review	56	1	4	2.55	.913
8.15 extra workload related to development plan	55	1	4	2.55	1.015
2.2 confrontation with pupils	56	1	4	2.52	1.128
2.3 pupils answering back	56	1	4	2.50	.972
Valid N (listwise)	55				

1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

The nineteen variables that were identified as having a mean stress score of 2.5 or above were considered to be a source of stress for the majority of respondents. Taken as a whole, at about 42% (*n=8*), workload was the factor which teachers reported most often caused them most stress. The next most common source of stress reported by the teachers in the sample, at about 26% (*n=5)* were issues related to pupil / teacher interaction. The least common sources of stress in the highest category at about 16% (*n=3*) were stressors linked to change and appraisal of teachers. The stressors with the highest mean stress score overall, are those outlined in table 15 below.

Table 15: Stressors which overall have the highest mean stress score

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
8.2 time pressures	55	1	4	3.20	.803
8.3 too much work	55	1	4	3.11	.786
8.7 paperwork	55	1	4	3.02	.871
6.5 inspection by HMIE	56	1	4	3.00	1.079
8.4 time management	55	1	4	2.89	.936
8.7 assessment	55	1	4	2.87	.982
5.4 addressing policy on inclusion	56	1	4	2.84	1.041
8.2 long hours	55	1	4	2.84	1.014
6.12 the paperwork associated with assessment	56	1	4	2.80	.796
5.1 constant changes taking place within the profession	56	1	4	2.79	.986
2.7 pupils don't value education	56	1	4	2.71	.948
Valid N (listwise)	55				

1 = no stress, 2 = some stress, 3 = greater level of stress, 4 = highest level of stress

The table shows that 55% (*n=6*) of the ten sources of stress considered to have a high mean stress score in the study, were attributed to items related to workload; followed by at 18% (*n=2*) for both issues related to the appraisal of teachers and changes taking place in education and one to pupil /teacher interaction.

6.2.9 Results from the attitude scale

As with the previous tables, the responses were processed using the SPSS package for quantitative data analysis which again made it possible to calculate the mean score and standard deviation of the variables. The response scale for the tables and figures are strongly agree (SA) = 1; Agree (A) = 2; disagree (D) = 3 and strongly disagree (SD) = 4.

Responses are summarised in tables 16, 17 and 18, below and throughout, figures are given in percentages.

Factor 9: Results of the issues related to status and promotion prospects are summarised in table 16, below

Table 16: Status / promotion opportunities

		Variable	Strongly agree %	Agree %	Disagree %	Strongly disagree %	Mean	SD
9.1		Being a good teacher does not necessarily lead to promotion	57.1	35.7	5.4	0	1.47	.732
9.2		There are too few opportunities for promotion	26.8	51.8	16.1	1.8	1.93	.732
9.3		Society has a diminishing respect for the teaching profession	55.4	28.6	14.3	0	1.58	.738
9.4		Teachers' salaries are out of proportion to workload	33.9	35.7	26.8	0	1.93	.797
9.5		Achieving the standard for Chartered Teacher will involve a great deal of academic work	62.5	32.1	3.6	0	1.40	.564
9.6		The Standard for Chartered Teacher requires an unreasonable personal financial investment	64.3	30.7	3.6	0	1.38	.561
9.7		The threat of redeployment is a concern for teachers	32.1	50.0	14.3	1.8	1.85	.732
9.8		Lack of job security within the profession has increased	21.4	46.4	26.8	1.8	2.09	.759

1 = strongly agree, 2 = agree, 3 = disagree, 4 = strongly disagree

Analysis of factor 9 shows that in the majority of cases, the mean is relatively close to 1 indicating the majority of respondents agreed with the statements made in relation to status and promotion opportunities in teaching. At about 95% (*n= 52*), the vast majority of teachers considered that being a good teacher did not in itself lead to promotion. About 82% (*n=46)* reported believing that despite the revised career structure put in place by the McCrone Agreement, there were still too few opportunities for promotion. About 27% (*n=15)* of respondents reported feeling salaries were not out of proportion to workload. On reflection this statement is ambiguous since there is no way of telling whether respondents felt that salaries

were / were not out of proportion because they were too high or whether they were too low. However table 17, below shows that there is a small, but significant negative correlation coefficient of -.420, -.316 and -.285 respectively between those respondents who thought salaries were out of proportion to workload and the pressure they felt from time pressures, long hours and too much work.

Table 17: Correlation between workload stressors and attitude to pay

Correlations

		Time pressures	long hours	too much work	Teachers salaries are out of proportion to workload
time pressures	Pearson Correlation	1.000	.701**	.787**	-.420**
	Sig. (2-tailed)		.000	.000	.002
	N	55.000	55	55	54
long hours	Pearson Correlation	.701**	1.000	.674**	-.316*
	Sig. (2-tailed)	.000		.000	.020
	N	55	55.000	55	54
too much work	Pearson Correlation	.787**	.674**	1.000	-.285*
	Sig. (2-tailed)	.000	.000		.037
	N	55	55	55.000	54
teachers salaries are out of proportion to workload	Pearson Correlation	-.420**	-.316*	-.285*	1.000
	Sig. (2-tailed)	.002	.020	.037	
	N	54	54	54	54.000

*. Correlation is significant at the 0.05 level (2-tailed).

Linked to the McCrone Agreement, an overall majority, 96% (*n=53*) of respondents had issues related to achieving the Standard for Chartered Teacher. Table 18, below shows a significant correlation between the two variables indicating that those who believe that achieving the standard for CT is too expensive (requires unreasonable personal investment), believe that it also requires a great deal of academic work.

Table 18: Correlation between finance for CT and work involved

Correlations

		achieving the standard for CT will involve a great deal of academic	SCT requires an unreasonable personal financial investment
Achieving the standard for CT will involve a great deal of academic	Pearson Correlation	1.000	.562[**]
	Sig. (2-tailed)		.000
	N	55.000	55
SCT requires an unreasonable personal financial investment	Pearson Correlation	.562[**]	1.000
	Sig. (2-tailed)	.000	
	N	55	55.000

**. Correlation is significant at the 0.01 level (2-tailed).

About 84% of respondents agreed with the statement that society had a diminishing respect for the teaching profession. There was less agreement, but still a majority who considered that redeployment (about 84%) and job security (about 70%) were issues for concern in the profession, figure 4, below

Figure 4: Lack of job security within the profession has

increased

lack of job security within the profession has increased
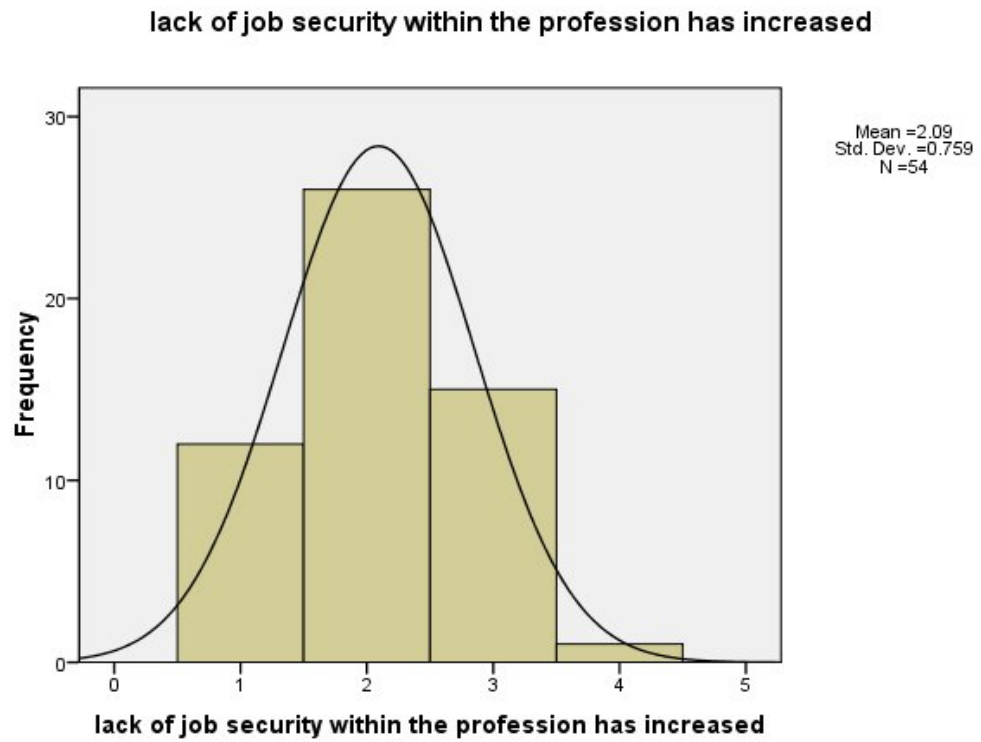
1 = strongly agree, 2 = agree, 3 = disagree, 4 = strongly disagree

Factor 10: Issues associated with the role of teachers are summarised in

Table 19, below

Table 19: Ambiguity of the teacher's role

	Variable	**Strongly agree**	**Agree**	**Disagree**	**Strongly disagree**	**Mean**	**SD**
10.1	There is uncertainty about the degree or area of a teacher's responsibility	**12.5**	**55.4**	**28.6**	**0**	**2.17**	**.637**
10.2	Schemes of work are poorly defined	**8.9**	**42.9**	**46.4**	**0**	**2.38**	**.652**
10.3	There is now more unfamiliarity with the demands faced by teachers	**28.6**	**58.9**	**8.9**	**0**	**1.80**	**.595**
10.4	Ongoing training for new curricula is not adequate	**32.1**	**44.6**	**21.8**	**0**	**1.89**	**.737**
10.5	Ongoing training for new teaching strategies is not adequate	**28.6**	**48.2**	**21.4**	**0**	**1.93**	**.716**
10.6	The number of pupils experiencing social problems is increasing	**64.3**	**32.1**	**1.8**	**0**	**1.36**	**.522**
10.7	The range of social problems experienced by pupils is increasing	**70.9**	**29.1**	**0**	**0**	**1.29**	**.458**

1 = strongly agree, 2 = agree, 3 = disagree, 4 = strongly disagree

Table 19 indicates that although the majority of respondents were generally in agreement with the statements (those with a mean close to 1) made in relation to the ambiguity surrounding the role of the teacher, there was some disparity in several areas. In particular, variable 10.2 *schemes of work are poorly defined.* If we look at figure 5 below, in conjunction with table 19 above, there is a slight skew to the negative side of the curve while the mean score of 2.38 in the table shows a higher disagreement with the statement, indicating that a high proportion of respondents, about 46% (*n=26)*, believed that new schemes of work were not poorly defined.

This is an area that would benefit from further investigation as the sample contained teachers from both primary and secondary schools and the question may not have been applicable to some secondary teachers, or to some posts in the primary sector.

Figure 5: Schemes of work are poorly defined

schemes of work are poorly defined
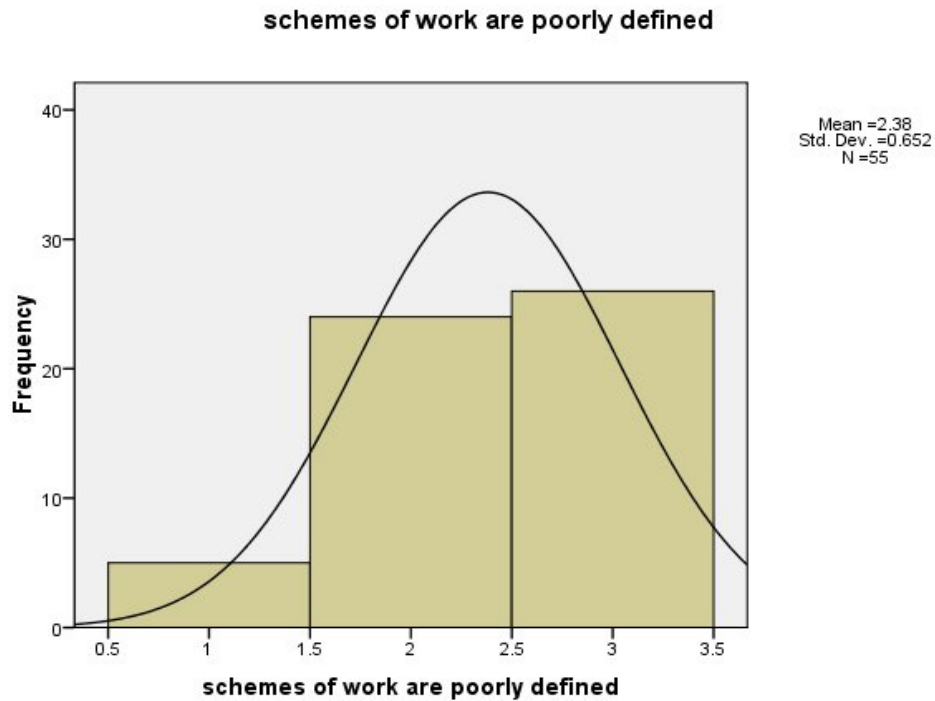
1 = strongly agree, 2 = agree, 3 = disagree, 4 = strongly

In regard to new curricula 10.4 and new strategies 10.5 introduced in teaching, about 78% (*n=43*) respondents felt that ongoing training in these areas had not been adequate. The variables where there was overall consensus of opinion were 10.6 and 10.7 which had a mean score respectively of 1.36 and 1.29, indicating a very high

level of agreement. About 98% of respondents felt that the number of pupils

experiencing social problems had increased, while as can be seen in figure 6, below,

100% of respondents believed that in their experience the range of social problems

faced by pupils had increased.

Figure 6: The range of social problems experienced by pupils is increasing
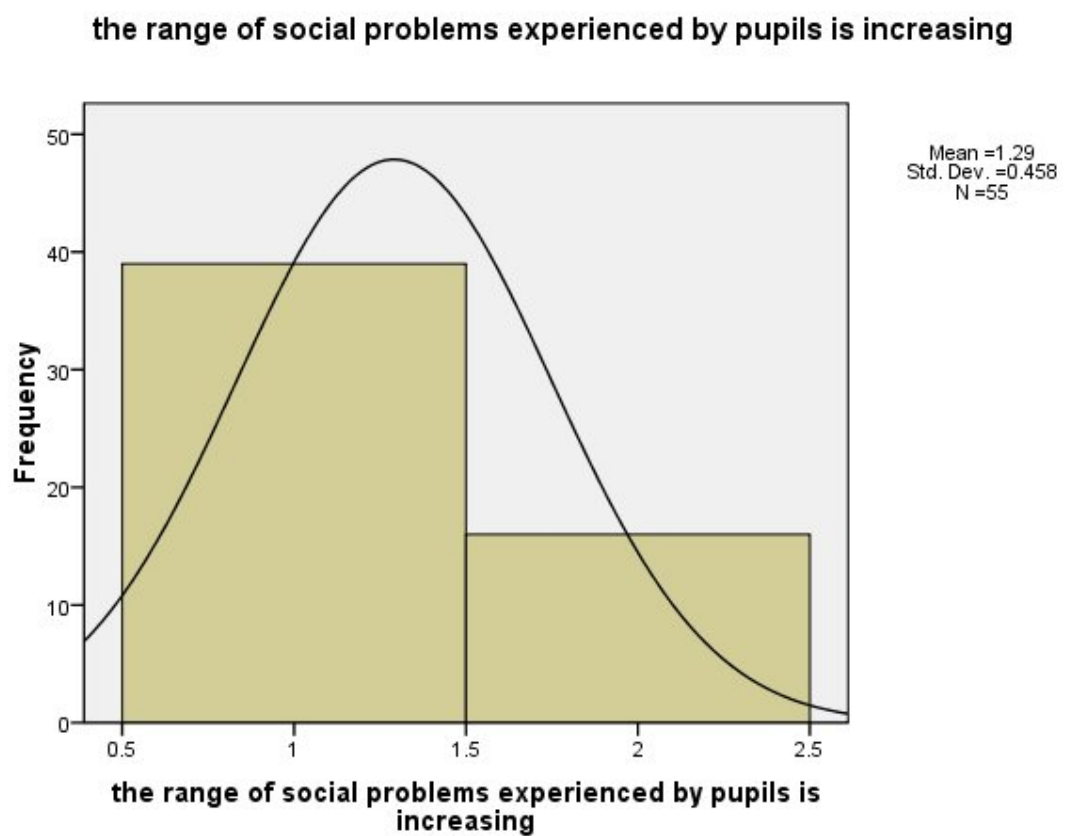
1 = strongly agree, 2 = agree, 3 = disagree, 4 = strongly disagree

Factor 11: National Priorities and local authority initiatives

The results from issues related to policy change is summarised in table 20, below.

Before proceeding to the table there are several points which may need clarified.

Firstly, one respondent, number 56 did not answer any questions following factor 6

in the questionnaire; therefore the total possible number of responses for factors 9, 10

and 11 was 55.   Secondly, in an attempt to ensure that respondents thought about

each question, the scale was set at 4 points rather than 5, which would have included

a middle scale, allowing respondents to select a "don't know" option. Several

respondents evaded this tactic by simply writing "don't know", by not responding to

the question, or by ticking the line between agree and disagree, which was taken to

mean "don't know". Subsequently, several questions had data missing over and

above that data from respondent 56. These lower response rates have further

implications for validity and reliability that need to be considered when viewing the

results. These questions and the total number of responses are listed in Appendix 21.

The figures in table 20 refer only to those teachers who responded to the questions

and not to the sample as a whole, therefore the percentages stated are from the list of

valid percentages in the calculations and may not at first appear to be correct, for

example, question 11.8 shows that 75% (*n=39*) of respondents agreed, while

question 11.9 shows that 76% (*n = 38*) of respondents agreed.

A third point is the way in which the questions are phrased or worded. In sections 9

and 10 the questions were generally negatively phrased and the coding scheme

applied was SA = 1, to SD = 4, thus, lower mean scores indicated a higher level of

agreement with statements and therefore a generally negative attitude towards them. In section 11, with 2 exceptions, the questions are positively phrased; therefore lower mean scores show higher levels of agreement and a positive attitude towards the statements. The exceptions to this are questions 11.19 and 11.20 which are phrased negatively, and since they are in the same section as positively phrased questions, the coding scheme for these questions was reversed thus SD = 1; D = 2; A = 3; SA = 4, so that lower means would show higher levels of disagreement.

Table 20: Issues relating to policy change

	Variable	Strongly agree	Agree	Disagree	Strongly disagree	Mean	SD
11.1	The National Priorities ensure that every young person fulfils their potential at school	3.7	29.6	55.6	11.1	2.74	.705
11.2	Formative assessment can be a powerful tool for improving learning	25.5	66.7	5.9	2.0	1.84	.612
11.3	Formative assessment is the most effective approach to raising attainment	5.6	50.0	38.9	5.6	2.44	.691
11.4	Work requirements can be completed in the contracted 35 hour week	1.8	9.1	40.0	49.1	3.36	.279
11.5	Getting 1½ hours reduced class contact time each week is always possible	6.0	36.0	44.0	14.0	2.66	.798
11.6	Pupil attainment has been raised since the introduction of the National Priorities	0.0	31.2	64.6	4.2	2.73	.536
11.7	New areas for development or new teaching strategies are constantly being introduced	18.9	73.6	3.8	3.8	1.92	.615
11.8	The Learning Community has introduced a large number of teaching and learning initiatives over the last four years	11.5	63.5	21.2	3.8	2.17	.667
11.9	There has been adequate training to implement these initiatives effectively	2.0	22.0	66.0	10.0	2.84	.618
11.10	Teachers feel confident in teaching the new initiatives	4.0	12.6	74.0	10.0	2.90	.614
11.11	Teachers have received adequate training to teach the new initiatives well	2.0	18.4	67.3	12.2	2.90	.621
11.12	Pupil attainment has risen in this time	0.0	41.9	48.8	9.3	2.67	.644
11.13	I am a more effective teacher due to implementing new teaching / learning strategies	10.0	54.0	28.0	8.0	2.34	.772
11.14	I am working harder and pupils are achieving more	11.8	33.3	52.9	2.0	2.45	.730
11.15	I am working harder, but there is little evidence that pupils are achieving more	12.0	46.0	38.0	4.0	2.34	.745
11.16	I feel fairly well satisfied with my job	22.6	56.6	15.1	5.7	2.04	.784
11.17	I really enjoy my work	38.9	40.7	11.1	9.3	2.04	.784
11.18	Most days I feel enthusiastic about the job	36.4	45.5	14.5	3.6	1.85	.803
11.19	Much of the time I have to force myself to go to work	10.9	9.1	47.3	43.6	1.65	.645
11.20	I frequently think about finding another job or taking early retirement	7.3	14.5	32.7	45.5	1.84	.938

1 = strongly agree, 2 = agree, 3 = disagree, 4 = strongly disagree

As previously stated, lower mean scores show higher levels of agreement. The statements in this section on the whole were positively worded and would show a positive attitude of teachers towards the statements; however, very few statements showed a mean attitude score less than 2.0.

Overall, teachers appeared to show a negative attitude towards the statements associated with policy change. Items 11.4 and 11.5 were related to the contracted 35 hour working week and non-class contact time (NCC) as stipulated in the McCrone Agreement (in section 2.2, 2005). Although at the start of the empirical study in June 2005, the McCrone Agreement had not been fully implemented, almost 90% of the teachers reportedly felt that the work they were required to do could not be completed in the 35 hour working week introduced for all teachers from 1 August 2001. One respondent felt the need to add a comment at the side of the question indicating that he worked nearer to 60 hours per week. At the same time, non-class contact time was 1.5 hours per week, but as can be seen in figure 7, below, respondents were divided as to whether getting NCC was always possible.

Only 50 respondents answered the question. Of those who did not answer, one respondent was a class teacher who had been in teaching for one year, but the others were members of the management team including one head teacher and one depute head. The others were principal teachers. It might have been expected that the senior management team would have been able to answer this question as it may have been an issue for discussion at management meetings; another reason might be

that principal teachers are given non-class contact time to carry out duties associated with the post.

Figure 7: Getting reduced class contact time is always possible

getting 11/2 hours reduced class contact time each week is always possible

Mean =2.66
Std. Dev. =0.798
N =50
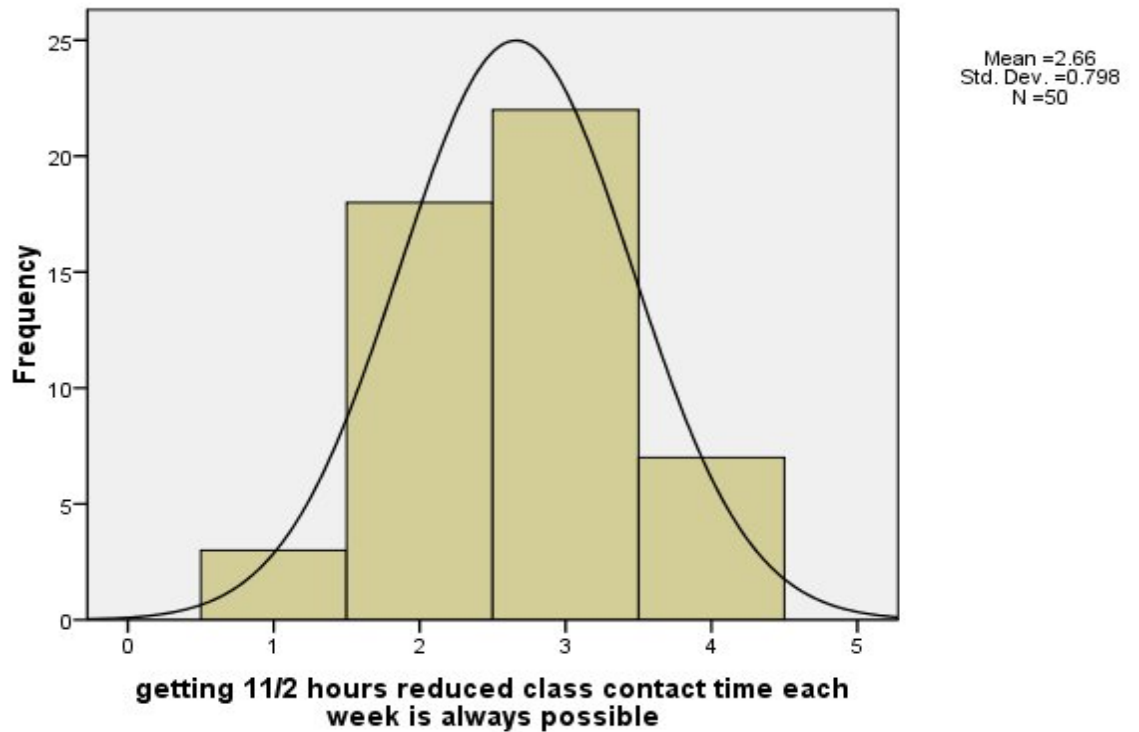
Factor 7 – The concern of management

 The results of the report from stress linked to the concerns of management are summarised in table 21, below. As is to be expected, given the hierarchical nature of schools, there were few respondents who were obliged to answer this section.

Table 21: Concerns of management

Descriptive Statistics

Variable	N	Minimum	Maximum	Mean	Std. Deviation
7.5 Constraints of local auth	9	1	4	3.00	1.000
7.4 The demands of local auth.	9	1	4	2.67	1.118
7.1 Staff do not understand the pressures a manager must sustain	9	1	4	2.50	.850
7.2 Others have unrealistic ally high expectations of the role	9	1	4	2.44	1.014
7.3 The extent of supervisory activities performed for the school	9	1	4	2.33	.866
Valid N (listwise)	9				

1 = no stress, 2 = some stress, 3 = greater degree of stress, 4 = highest level of stress

Table 21 shows that the variable which promoted staff reported caused most stress was 7.5 *Constraints of the local authority* with a mean score of 3.00 (SD- 1.000). The mean stress score for each variable is relatively high; however, the number of respondents is too small a sample for meaningful statistical analysis.

6.2.10   Summary of closed questions

Initially, from the results of the questionnaire, it might be argued that it is possible to conclude that overall, teachers in the study reported more stress from traditional pressures of workload and accountability than from issues linked to policy change and that indeed policy change had little affect on the professional lives of teachers in

190

the study. However a closer look at the results from the attitude scale is required

before that indication can be confirmed. This discussion will take place in chapter 7.

6.2.11 Summary of respondents who reported the highest mean stress scores

Table 22: Profile of respondents with the highest mean stress score

Resp	post	g/der	yrs/teach	Age	Status	Stage /teach	Mean stress score
29	Prom	m	6-10	30-39	FT	Secondary	3.418
25	cl. T	m	6-10	40-49	FT	Primary 6	3.394
23	cl. T	f	16-20	40-49	FT	Primary7	3.373
24	cl. T	f	20 +	40-49	FT	Primary 6	3.135
21	cl. T	f	20 +	50-59	FT	NCC cover	3.106
28	prom	f	20 +	40-49	FT	Secondary	2.985
32	prom	m	20 +	50-59	FT	S4 & S5	2.972
19	cl. T	m	6-10	20-29	FT	Primary1 /2	2.895
20	cl. T	f	0 -5	30-39	FT	Primary 5/4	2.866
34	cl. T	f	20 +	40-49	Job share	secondary	2.851
27	prom	m	20 +	50-59	FT	secondary	2.847

To protect the identity of some respondents, the abbreviation "prom" is used to

describe staff in promoted posts.

The quotations in this section originate from the open questions in the questionnaire,

i.e. questions 1.10 and 1.11 related to career development; question 1.13 related to

intention to leave the profession / retire and section 12 related to CPD.

Table 22 above shows the profile of respondents who reported the highest mean stress scores overall. Five of the eleven (45.5%) respondents are male which is 33% of the total male population (*n=15*) in the empirical study. About 73% (*n=8*) of the teachers are more than 40 years old. Five of the eleven teachers including some with a promoted post, work in the secondary sector, three work in the upper stages of primary, two respondents have a composite class in primary and the final teacher covers non-class contact time in a primary school.

This teacher, respondent 21, is a female aged between 50 – 59 years old. A class teacher for 31 years, she is now covering NCC for one year while she shares responsibility of a class with a probationer. Her NCC timetable involves delivering the physical education programme for primaries 1 – 7. When asked in section 12 of the questionnaire, how many hours of CPD she did over and above the mandatory 35 hours, she replied, "*God knows*" stating that her CPD activities included, but not exclusively, "*devising a method of contributing to all children's reports*". Her response to question 1.12 was that she was unsure, but probably planned to take early retirement, claiming: "*this is not the job that it was when I began my career in 1974. There is too much emphasis on the disorderly sector of pupils*".

In responding to questions linked to job satisfaction (11.16) this teacher stated that she "*strongly disagreed*" with the statement "I really enjoy my work".

Respondent 25 had the second highest mean stress score. A teacher for 6 – 10 years and in his current post for one year, he stated that he was not interested in pursuing either a managerial post or Chartered Teacher (question 1.9), claiming:

> "*overloaded curriculum; not enough time to do my job properly. CT would in my opinion dilute this even further and bring extra responsibilities. I do not think that the profession needs.*"

He also intended to take early retirement due to:

> "*the pace at which society is changing; ICT, drugs, breakdown of the family, neglected children, undisciplined children, lack of firm guidelines to deal with these issues, inclusion, curriculum overload, accountability to too many agencies who have very limited knowledge and interest in the overall issues which affect teaching*".

Respondent 23, who had the third highest mean stress score, was also uninterested in pursuing further career development stating that "*there was too much to do already*". She intended to take early retirement because she "*felt tired and jaded*"; the extra hours of CPD in which she was involved were "*too many to count*" and included "*reading of new materials, legislation, initiatives etc*".

Respondent 24, also female, had been in the profession for more than 20 years and did not intend to pursue her career further. Reasons given were "*health and family commitments*". She stated an intention to retire early due to "*discipline deterioration, workload/overload and curriculum, too many new initiatives introduced without proper consultation or training*". She claimed to spend approximately 55 – 70 hours on CPD activities over the 35 hour maximum requirement, citing:

> "*courses related to development plan and to personal CPD needs, familiarisation with new schemes and topics, researching, making resources to supplement / support curriculum*".

Respondent 32 also indicated that he would consider taking early retirement "*for possible health reasons and if there was a package*". He stated that he spent more than 35 hours per year on CPD involving SQA (Scottish Qualifications Authority, examinations at secondary school level and above), but did not state how many hours. Respondent 27 stated that he spent about 150 extra hours of CPD activities that involved reading lots of reports and investigating the appropriateness of web sites for school use.

Respondent 28 was in a promoted post in the secondary sector, but was uninterested in further career development since:

> "*a management post outwith P.T. means less classroom teaching. P.T. allows you to be more involved with subject and curriculum. Finance attached to opportunities to pursue Chartered Teacher. Considerations for younger staff perhaps.*"

She also indicated that she might consider early retirement:

> "*only yes if financial picture suits. Opportunities are no longer there for people 45 – 55 yrs although these are the <u>most experienced</u> people in the schools*" (teacher's underlining).

Respondent 20 was unsure if she would pursue further career development. Aged 30 - 39 years, she had been in teaching for less than five years, and replied that she didn't know if she would consider early retirement. She reported undertaking 40 hours more CPD than required, stating "*professional reading and research etc*" as the activities.

Aged 20 – 29, respondent 19 was the youngest of those who reported a high mean stress score. At the time of the enquiry he had responsibility for a composite primary 1/2 class. He reported that he did not feel well satisfied with his job. He intended to pursue a management career in teaching as he would "*like to have more input into the direction and focus for whole school issues*". He reported he did not exceed his 35 hours of CPD activities.

Overall, respondent 29 had the highest mean stress score of 3.418 which indicates a highly negative response to both the stress factor questions and the attitude scale questions. At the time of the enquiry he was aged 30 – 39, had been a teacher for between 6 and 10 years and had held a promoted post in the secondary sector for one year. He wished to pursue a career in management for "*financial benefits*". Linked to job satisfaction he reported that he "strongly disagreed" with the statements "I feel fairly well satisfied with my job; I really enjoy my work; and most days I feel enthusiastic about the job". He agreed with the statements "much of the time I have to force myself to go to work" and "I frequently think about finding another job or taking early retirement".

Five of these eleven respondents reported that they would seek early retirement. There is one further point of interest. Of the teachers who reported the highest mean stress scores, five worked in the secondary sector. The six other respondents worked in the primary sector and five of these six teachers worked in the same school.

6.2.12 Respondents who reported the lowest mean stress scores

Table 23: Profile of respondents with lowest mean stress score

Resp/t	post	g/der	ys/teach	age	Status	Stage /teach	Mean stress score
2	cl. T	F	6 -10	20-29	FullTime supply	Primary 4	1.328
5	T	F	6 -10	50-59	Cluster support	Primary 1-7	1.373
22	T	F	16-20	50-59	Cluster support	Primary 1-7	1.418
35	prom	F	20 +	50-59	Full time Perm	Secondary.	1.492
45	cl. T	m	< 1	30-39	Full time perm	Primary 1	1.583

Four female and one male teacher reported a low mean stress score. Four
respondents worked in the primary sector and were unpromoted; respondent 35 was
in a promoted post in the secondary sector. Respondents 5 and 22 were employed
full time as additional support for learning teachers within the primary schools in the
learning community. As such, they did not have responsibility for whole class
teaching, but worked with individuals or small groups who needed extra support with
learning. (At the time of writing this thesis, April 2012, these jobs have come to an
end and cluster support teachers have being redeployed as class teachers.
Respondent 5 has reported to the researcher that she is very distressed by this
situation as are all of the teachers involved). The single item that respondent 5 found
stressful at level 4 was inspection by HMIE. The items that she reported stressful at
level 3 were time pressure, long hours, too much work, and CPD which involved a
great deal of work keeping informed of strategies and materials for use when

teaching pupils who had learning difficulties. Respondent 5 also reported that she did not really enjoy her work nor did she feel enthusiastic about the job.

Respondent 22 who also worked as a cluster support teacher reported stress at the highest level from feeling the need to continuously maintain a high standard and the way data from National tests are published; and at level 3 from feeling the need to be accountable. She also reported stress at level 3 from time pressure and long hours.

Respondent 2 had the lowest reported mean stress score overall. On only two items did she report a stress score of three; these were time pressures and having to achieve the targets for National Tests. She reported that she spent between 60 – 70 hours per year on CPD including learning Italian to teach in primary school and ICT courses.

Respondent 45 was a male teacher aged 30 – 39 who had been in the teaching profession for less than one year and at that time taught in primary 1. He hoped to pursue a career in management and was studying for an M.Ed. He stated that:

> "*I entered teaching having had two managerial posts in other environments and think I have the aptitude to be an effective manger, and feel that the experience and training I had outwith the teaching world to be of value and transferable. I enjoy the functions of management and the relationships that can be developed*".

This teacher was the only respondent in the sample who reported no stress from every variable in section 8 – workload. In general, he reported stress from factor 3 – management and structure of the school. He reported that 75% of the variables did produce feelings of stress, with 50% of the variables reportedly giving him stress at the highest level. He reported stress at level 4 from two further items related to

management i.e. from a lack of management support in discipline matters and having to comply with senior school management. Only two other variables reportedly gave him stress at level 3 and 4 respectively, they were the poor physical condition of the school and the lack of information as to how changes are to be made. He reported that he did really enjoy his job and most days he was enthusiastic about it, but that he did not feel fairly well satisfied with his job. He also reported spending about 300 hours on CPD in that year while he studied for a Masters degree in education.

Respondent 35 was in a promoted post in the secondary sector. She reported that she wished to pursue a career in management as she enjoyed the job that she had at that time. She reported very little stress overall, apart from stress at level 4 mainly derived from factor 8 – workload and factor 6 – appraisal; the paperwork associated with assessment; time pressure; long hours; administration tasks; paperwork and assessment. She reported that she spent more than 35 hours on CPD, but did not say how many hours or what the CPD activities were.

Although these teachers overall reported a low mean stress score, they did have issues with time pressures, long hours, inspection by local authority and HMIE and issues related to national testing. Many of them also reported a relatively high negative attitude to issues elated to new policy.

6.2.13 Respondents studying for a higher degree

The reported mean stress scores and profiles of those teachers studying for a higher degree are summarised in table 24, below.

Table 24: Respondents studying for a higher degree in ascending ranked order

Resp/t	post	g/der	yrs/teach	Age	Status	Stage /teach	Mean stress score
45	cl. T	m	< 1	30-39	Full time P	Primary 1	1.582
47	prom	F	20 +	40-49	management	P 4 – P 7	1.653
44	cl. T	F	20 +	50 - 59	Full time P	Primary 1	2.014
46	cl.	F	6 - 10	40 - 49	Full time P	Primary 7	2.212
48	cl. T	F	6 - 10	20 - 29	Full time P	Primary 2	2.298
49	cl. T	F	6 - 10	30 - 39	Full time P	Primary 6	2.50

The profile of respondent 45 has been detailed above.

Respondent 47 was part of the management team of a small rural school and had a teaching commitment for three days each week. She stated that she chose the route to management because she "*wanted to be more involved in the strategic direction of the school*". Although in general she had a low mean stress score, she did report stress at the highest level from long hours and paperwork. Despite studying for a higher degree and spending "indefinable" hours of CPD, she reported no stress from CPD. She did disagree however, with the statements that pupil attainment had been raised since the implementation of new policies, and that she was working harder and pupils were achieving more. She reported also that she was not well satisfied with her job, but that she enjoyed her job and on most days she felt enthusiastic about it. Respondent 47 reported a high mean stress score for the factor related to concerns of management linked to the constraints of the local authority and relationships with staff, where her mean stress score was 3.0.

Respondent 44 was studying for a Doctor of Education degree. She was a primary 1 teacher and stated that she did not wish to follow the route to management or to CT. She already held a masters degree in education and was not prepared to pay for another one. She reported stress at the highest level from dealing with: basic pupil behavioural problems; dealing with pupils who do not seem to value education; addressing policy on inclusion; the E.S. topics recommended by the local authority; time pressure; long hours; too much work and time management. At the same time as reporting relatively little stress overall, she reported a negative attitude to issues related to new policy. She agreed that she really enjoyed her work and that most days she felt enthusiastic about the job, but reported she believed she was working harder, but there was little evidence that pupils were achieving more. Due to her studies for an Ed.D she completed 700 hours of CPD in a year.

Respondent 46 reported her intention to seek a Chartered Teacher post.

> "*I have chosen that route because before entering teaching later in life, I had previously held a management position and I changed career to work with children…and CT would allow me to remain largely class committed*".

She reported stress at a level of 4 for: witnessing increased aggression between pupils; all items related to the school environment; feeling the need to continuously maintain a high standard – although she added that she mostly did this to herself; the need to modify teaching strategies to raise attainment; the way data from national tests are published; time pressure; time management and private life interferences. Once more this respondent also reported a generally negative response to questions in the attitude scale. She reported that she disagreed with the statement that she was working harder and pupils were achieving more. She strongly agreed that she

enjoyed her work and that she felt enthusiastic about the job. In addition to studying for an M.Ed, she was studying for a Post Graduate Certificate in computing and undertaking training in modern languages in the primary school in French. She reported that she spent about 800 hours per year on CPD activities.

Respondent 48 stated that she intended to pursue a post in management. She was about to complete an M.Ed and that had been her goal for some time. She was now considering Principal Teacher posts with the ultimate goal to be a Depute Head. Although she reported a number of stressors at level 3 of stress, the single report of stress at level 4 was administration tasks. She had a mixed attitude score to variables related to new policy, but the majority were negative. She reported that she spent too many hours on CPD. Continuing professional development was one of the stressors that she reported at level 3.

Respondent 49 was studying for an M.Ed. to lead to SCT and allow her to remain in the classroom "*hands on*" working with children. The variables this teacher reported caused her stress at level 4 were: poor staff / pupil ratio; class size; long hours; paperwork and assessment. She reported completing more than 35 hours of CPD, but did not say how many.

Although they were spending many more hours on CPD, these teachers overall did not report a high stress score. In general, the items they found stressful were similar to those stressors identified as the ones with the highest overall mean stress score.

However, as with the respondents from the two learning communities, there appeared to be a general negative attitude linked to the variables related to new policy.

6.2.14 Results and comments made to the open questions in the questionnaire

Questions 1.8 and 1.9 asked teachers which career path they hoped to follow; questions 1.10 and 1.11 (in Appendix 2) asked teachers to give reasons for their choice. Table 25, below presents the teachers' choices.

Table 25: Career development choices

Already senior management	**5**
Seek a management post	**20**
CT scheme	**5**
CT then management	**2**
Remain as an unpromoted teacher	**24**

Nine respondents (22%) reported they would seek early retirement; three of these respondents were in age range 50 – 59, five were in age range 40 – 49 and one male secondary teacher who was between 30 and 39 reported that everyone thought of early retirement no matter what age they were. Reasons given for their decision included: health, factors intrinsic to the job "*inclusion, curriculum overload, accountability to too many agencies who have very limited knowledge and interest in the overall issues which affect teaching*; changes in society: "*Pace at which society is changing;*

ICT, drugs, breakdown of family, neglected children, undisciplined children, lack of firm guidelines to deal with these issues, and perhaps surprisingly, career development: "*Yes only if a financial package suits. Opportunities are no longer there for people 45 – 55 yrs although these are the <u>most experienced</u> people in the schools*".

Only six teachers in the primary sector and one from the secondary sector indicated intent to proceed to CT status. Two of these teachers have chosen the route to CT initially to give them a greater chance of obtaining a promoted post as principal teacher at a later stage. Of the six respondents studying for a M.Ed degree, two hoped to achieve CT status. Three other respondents in this group were following the route to management, and one already held a headteacher post. No male teachers stated intent to become a CT. The reason given by the majority for choosing CT was that they enjoyed working with children and wished to remain in the classroom.

Content analysis of the results (Appendices 16 – 19) completed by simple colour coding and looking for patterns in the responses, revealed several reasons why the teachers in this study chose not to follow the route to Standard for Charter Teacher. Twenty teachers, (37%) indicated they would seek a post in management in the future. In this group, several thought that there would be more financial reward from a managerial post, plus there was no financial outlay required in becoming a principal teacher. The majority however thought that there was more status or fulfilment attached to the role of principal teacher and that they: "*would be able to make a difference to school policy and curriculum*" "*wanted a sense of professional achievement in their career*" "*had ambition and drive and leadership skills they*

wished to develop". They felt this would be achieved through a management post, not through CT.

For ten teachers (26%), the main barrier to CT was the financial outlay. One teacher already had a M.Ed and was not prepared to incur further expenditure. The workload involved in the study was a deterrent for others, but one teacher was prepared to do the work if the authority paid the course fees. One suggested he could move into management without the study involved in standard for CT. Some thought they were already overburdened with work from recent changes in the profession and were not prepared to take on more. Four teachers (10%) were happy being a classroom teacher and did not wish to develop their career further. Three teachers (8%) stated they were too near to retirement age; three others (8%) stated they had family commitments which prevented them currently thinking about career development, and the goal for a further three respondents was to secure a permanent post. One teacher stated simply, that she was not interested.

6.2.15 Results linked to CPD

 Through the McCrone Agreement, teachers have an ongoing commitment to maintain their professional expertise and are required to maintain a personal CPD portfolio detailing the activities for the mandatory 35 hours of CPD undertaken each year. The results related to CPD activities are presented in Appendix 20.

The most common CPD activities detailed were related to national and local authority priorities at that time. Respondents reported: professional reading linked to

new initiatives; developing a wide variety of ICT skills; learning to teach a foreign language; assessment and involvement in a working party. Secondary teachers were involved in developing coursework.

Six respondents were studying for a higher degree in Education. These teachers reported as many other CPD categories as the teachers who were not studying for a higher degree, e.g. courses related to new initiatives, computing, modern languages, and working parties. Two respondents, who registered interest in SCT, were studying for a post-graduate certificate in primary health and physical education. One teacher was undertaking the "Project in Leadership" course as part of her career route to principal teacher. Several teachers reported spending time becoming familiar with curriculum content related to a new teaching stage and others made resources for classroom use. Although it was not among the top ten stressors reported in the survey, 75% of teachers reported feelings of stress linked to CPD, with 15% reporting stress at level 4, including one teacher who did no more than the mandatory 35 hours.

6.2.16 Time spent on CPD

All 55 teachers who completed this question met the maximum mandatory 35 hours for annual CPD as required by the Agreement. However 49 teachers reported undertaking more than this. As might be expected, the six teachers completing a degree course spent more time than the other respondents on CPD; one teacher claimed that she spent 800 hours per year. One teacher completing a post graduate certificate course undertook more than 300 hours. This teacher however, currently

job-shared, working 0.5 FTE. She stated this as the reason why she was able to complete a post-graduate course, and could not see herself undertaking such a CPD commitment when she returned to full time employment the following year. Six teachers spent more than 100 hours, sixteen teachers stated that they spent more than 35 and less than 100 hours, twenty teachers reported spending more than 35 hours per year on CPD, but could not say exactly how many. Six teachers stated they did not spend more than 35 hours on CPD activities. It is interesting to note that two of these respondents were probationers. The 0.3 FTE that probationers are allowed per week, for them, appeared to be sufficient to cover their CPD needs. Respondent 40 did not make a list of any CPD activities in which he engaged, despite the fact that he is required to maintain a CPD portfolio during his probationary year.

6.3   Analysis of group interviews

There were several purposes for this part of the research: to increase the range of data from the sample population by following up questions and probing more deeply into understanding the pressure felt by teachers in the study; and to establish an understanding of the concept of stress from members of the study population. No teachers had volunteered to keep a work diary (section 5.8) therefore, the group interviews provided an opportunity to compare the sample population's understanding of the concept of stress by asking the same question as was asked of a small number of people (7) who were not teachers, before the study began (section 1.4). A third reason was to increase the validity of the study by corroborating the data generated in the questionnaire.

6.3.1 Findings from group interviews

The procedure for carrying out the interviews is detailed in section 5.8. The written responses were read through, names changed, and then typed into a word document as the first step in becoming familiar with the data. Codes were assigned to recurrent themes, representing a description of each teacher's experience, setting up a thematic framework within which data could be categorised (see appendices 7 – 14).

The themes that emerged were designed to answer research sub-question 2 (section 4.3): *What kind of experiences of stress appear in teachers' accounts?* The intent was to understand the perspective this group of teachers held regarding the main influences of stressful experiences in their working life. Teachers were asked three questions:

Can you complete the sentence as it applies to you? Stress is ….

Do you experience stress at work and if so what is it you find most stressful about the job?

What measures do you take to try to relieve stress?

The data were read repeatedly while looking for patterns and meaning. Notes were made and initial responses formed. Although the data were directly related to the phenomenon of stress, initially a great many codes were generated inductively as I tried to remain impartial and avoid missing features of the data that could prove relevant and of interest. Overall, four main categories appeared in relation to stress that enabled the questions to be answered, namely *the nature of stress, causes of*

stress, effects or outcomes of stress and *ways to mediate stress*. The data were further broken down into themes under these four broad headings.

The nature of stress as reported is complex, involving both objective (5) and subjective (8) components. There was reference to pressure from time restraints (2), for example, Grace thought that "*stress is more work, not enough time*" a lack of support (1) and recognition that stress may be part of every job. Irene acknowledged that stress could be a motivator; however this was negated by the "*constant existence of stress*" in her job. The subjective nature of stress as described by the teachers gives cause for concern as the words used, *overburdened, overload, getting on top of you,* for example, indicate the release of the stress hormone cortisol that disrupts higher mental processes and makes coping with everyday tasks more effortful (Sandi and Pinelo, 2007).

A huge number of causes of stress were reported (about 45) which were grouped under the broad headings of *Lack of control, Workload, Discipline, Personal factors, Interpersonal factors, Relationship with children, Management and Inclusion.* Causes of stress appeared to be rooted in workload (19 references), with most responses related to time pressure (7) followed by references to the curriculum (5). Lesser reference is made to assessment and accountability (2) report writing (2), parents' nights, the development plan, working parties and planning lessons. Personal factors (19) were significant for this group of teachers. Several teachers felt pressure from self-evaluation of their teaching and their workload (13 references); worrying over, for example, whether they were well enough acquainted with new

aspects of the curriculum to teach it effectively and also feeling stressed by worrying

over their ability to complete tasks on time. Adele stated:

> "*Stress is feeling burdened with tasks to complete, worrying about the demands which are put upon you, worrying about delivering the curriculum properly*".

 Interpersonal factors such as relationships with management (1), with parents (2)

and feeling that perhaps other staff members are not working as hard as they,

themselves are (3), were a source of stress. Frances reported that:

> "*Some staff don't pull their weight and get away with it. I seem to do all that is asked of me while some others do nothing*".

A further major source for some was expressed as of a lack of control over aspects of

their working life (11). Many of these factors were related to items which

management could possibly have taken more control to remedy (8), particularly in

relation to workload and other staff members. Three were factors related to pupils,

for example, time keeping and absences, over which teachers have no control. Stress

caused by relationships / interactions with pupils (15) were split into three factors.

For these teachers, dealing with difficult behaviour (5) appeared to be less of a

source of stress than some factors already mentioned; however there were concerns

voiced regarding the policy on inclusion ((4). Adele reported that when there were

issues with the most disturbed children, she asked the support for learning assistant

to take them from the room so that the rest of the pupils could remain calm.

The welfare of pupils was also a concern for some (5) as demonstrated by Betty:

> "*How to help children with special needs, physical welfare of children and how to build on mental capabilities, how to deal with social / behavioural issues, anger management, development of caring attitudes*".

The outcomes or effects of stress were psychological (7) or physical (1) or a combination of both (7) and were exclusively negative (15). The outcomes tended to be felt emotionally, for example, "*feeling that you can't cope and are not doing well*"; "*feeling that you are not coping, upset, overtired, wound up*"; "*trying not to lose my temper and take things out on the children*"; "*leaves you bad tempered*" and psychologically, "*anxiety when I am not in control of what I have to do*"; "*anxiety and exhaustion*"; "*depression, bad moods and anxiety*".

Some outcomes of stress reflected how respondents worried about their teaching performance, "*you become frustrated at not being able to teach properly*"; worrying *about delivering the curriculum properly*"; "*inability to get job satisfaction because kids can't learn*"; feeling inadequate and unable to cope with workload, and manage behaviour of pupils*"; "*I feel inadequate and unable to stop them answering back*". The effect of stress on one teacher (Betty) was that she worried "*in some cases, about the home life of children*".

The teachers reported many outlets (28) for relieving stress which were sub divided into three areas: physical (10), social (5) and taking positive measures to alleviate stress in their lives (13). Running, going to the gym, walking, deep breathing, yoga, reading and crosswords and surprisingly swearing, were physical activities undertaken to relieve stress. Several teachers found that talking things over with colleagues (4), friends or partners helped, as did maintaining a social life. Several of the nine teachers took positive measures to control the amount of stress in their

working life. As well as practising deep breathing and walking at night for 30 minutes, Adele stated:

> "*(I) try to be as organised as I can be so that the class runs smoothly. Stop feeling guilty about not covering everything all of the time. (I) have the most disturbed children removed from the class to work on a one-to-one with the classroom assistant so that (the) rest of the class remain calm*".

Betty did crosswords, read and watched television to relax and also found that:

> "*In class various calming activities (for children) are helpful. Talking and listening sessions are beneficial as is circle time. Story telling or audio tapes are also good*".

Carol stated:

> "*I try not to be in school any later than 4.15 pm, even if it meant taking things home with me. The work I do take home is stuff that doesn't need a lot of focus / concentration to do. I will only start to look over things on a Sunday, but never on a Saturday*".

Helen relieved stress by "*making time for relaxation or activities*".

In contrast to some non-teachers who completed these questions prior to the study and other findings in the literature (Travers and Cooper, 1993; Johnstone, 1993), Irene did not think that consuming alcohol was a way to relieve stress: "*Believe it or not. I am not a big drinker. I don't think alcohol would let me unwind*".

6.4   Summary of findings and analysis

This chapter began by presenting the findings of the questionnaire, including the three open questions. The aim was to establish whether teachers were experiencing stress in their job, to identify factors that were contributing to occupational stress, and to establish if there was a relationship between career development and workload

stress. Findings from the data suggest that for the teachers in the study, a variety of

stress factors associated with the job of teaching, related both to new policies and

factors intrinsic to teaching itself, are sources of pressure. The findings from the

group interviews somewhat corroborate the findings from the questionnaire. Chapter

7 will bring together the main themes from the above data and discuss these in

relation to the research questions and the literature in previous chapters. The

subsidiary research related to Curriculum for Excellence will also be discussed in

chapter 7.

Chapter 7   Discussion

7.1   Introduction

In the previous chapter, the responses to the closed and open questions in the

questionnaire and the texts of the participants' responses in the group discussion

were analysed using the processes discussed in chapter 5. While reference will be

made to the findings of some subgroups of respondents, there is awareness that the

numbers in the sample are too small for any differences to be considered significant.

Although the findings of this study are limited by its small scale and the fact that the

participants were primarily drawn from one learning community, many examples of

sources of stress were present in both the questionnaire and the group interviews.

Some patterns emerged in terms of the demographic features of teachers with the

highest and lowest mean stress scores (Table 21 and Table 22, in section 6.2.11). In

addition, the data from the group interviews highlighted the subjective nature of

stress that could prove detrimental to the health of some teachers; the effects of

stress, many of which were felt emotionally, perhaps indicated a loss of self

confidence for some teachers (section 6.3.1). The data also revealed how several

teachers were taking positive steps to reduce work related stress in their lives. This

chapter discusses these findings in relation to the research questions and with

reference to theoretical perspectives and other research evidence set out in the

literature reviewed in previous chapters (3and 4).

Before offering a concise response to the main research question - *What evidence is*

there from teachers of occupation al stress in their work in relation to policy

initiatives and change?(5.3) – the findings for the three associated sub-questions are now discussed.

7.2   Sub –question 1

What are the origins and causes of reported stress, particularly in relation to policy change and traditional stressors reported in previous research?

Considered together, the results from the 56 questionnaires and nine group interviews support the view reflected in prior studies, that teaching is a stressful occupation. These outcomes are linked to various stress factors in the job of teaching, identified by Travers and Cooper (1993, in 4.2.6) and explored in this study i.e. pupil / teacher interaction; management / structure of the school; school environment; changes taking lace within education; appraisal of teachers; the concerns of management and workload. Each factor will now be discussed in turn, following the structure of the questionnaire (6.2.1). The method of calculating the stress scores for variables and respondents is outlined in section 6.2.5.

7.2.1   Factor 2: pupil/teacher interaction

Confrontation and conflict with pupils, especially in areas of deprivation, was reported by Galton and MacBeath (2008). This is reflected in the current study in terms of pupil / teacher interaction. All variables within factor 2 had a mean stress score of more than two and were a source of stress for more than half of respondents. About 89% of teachers reported feeling stressed dealing with pupils who do not value education; and from witnessing increased pupil aggression (section 6.2.5).   In

the group interviews, pupil misbehaviour was mentioned, but appeared less of an issue than other factors. For example, Frances reported: "*stressful experiences are related to discipline – when pupils are badly behaved and they do not respond to reprimands*".

Pupil misbehaviour is an ongoing problem in schools. Pupils' failure to work or behave has been highlighted as an issue for teachers in previous studies, as far back as 1978 (Kyriacou and Sutcliffe) and at the beginning of the 1990s (Borg et al, 1991; Dunham, 1992; Travers and Cooper, 1996). It also contributed to findings on stress in the Scottish study undertaken by Johnstone (1993), but was reported as less of a problem then, than other factors. Where there may be a material shift is in the types of behaviour reported. In Johnstone's 1993 study, repeated minor offences were seen by teachers to be more of an issue than major single offences; in contrast, the current study reported minor behavioural problems as one of the least stressful variables associated with pupil / teacher interaction. As reported above, teachers were experiencing stress from more serious forms of pupil misbehaviour. Galton and MacBeath (2008) acknowledge that teachers have always had to deal with undisciplined and troubled children, but "*the scale, complexity and intensity of pressures on them in the postmodern world are unprecedented*" (p.5).

In the current study, 5% (*n = 3*) of teachers reported feeling stress at level 4 for the top three stressors in this category. All of these teachers were male. The respondent with a maximum mean stress score of 48 (mean = 4) was a male teacher in a primary 6 class, was between 40 – 48 years of age and had been in teaching for between 6 and 10 years; while two female respondents reported the lowest mean score of 13

(mean = 1.08) for this factor. Both teachers were 40 – 49 years of age and had more than 20 years teaching experience. Both were in promoted posts, one in a primary school and the other in a secondary. It is likely that these teachers did not have as much face-to-face contact with pupils on a daily basis as mainstream class teachers; therefore, there would be less opportunity for interaction with pupils, positive or negative.

Or it may be that management view misbehaviour from a different perspective than staff in general. In the Travers and Cooper 1993 study, mainscale teachers reported a higher level of stress from "pupil behaviour" than promoted staff. A Scottish schools National Foundation for Educational Research (NFER) survey of school staff, 2006[4], mirrored this finding. When asked to rate on a scale of 1-5 how serious they perceived indiscipline to be, (a rating of 5 indicated the least problem) 70% of headteachers gave a rating of 4 or 5; 45% of teachers and 41% of additional support staff gave the same rating. Conversely, 27% of teachers and 22% of support staff gave a rating of 1or 2, indicating the problem was serious, compared with 6% of headteachers.

Dealing with many different forms of conflict is considered one of the factors which erode the energy, confidence and motivation of school staff, particularly when discipline issues are excessive and infect teacher culture. In the current study, this view was voiced in teachers' reasons for wishing early retirement. One teacher commented: "*This is not the job that it was when I began to teach in 1974. There is*

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[4] The Official Statistics Publication for Scotland can be found at www.scotland.gov.uk/publications

too much emphasis on the on the disorderly sector of pupils"; while another gave

"*discipline deterioration*" as one of several reasons for early retirement.

7.2.2 Factor 3: management/ structure of the school

Variable 3.3 "*conflict between the needs of the class and views of senior management*" was reported for 75% of respondents, however, differences between staff and management is not one directional; some members of the management team also reported this variable as a stressor. Only nine respondents were part of the management team, which was too small a sample for meaningful statistical analysis, but eight of the nine respondents reported issues of staff not understanding the pressure they experienced. Eight of the nine also felt that some staff had unrealistic high expectations of what the role of management involved.

Coping with colleagues who were not fulfilling their responsibilities was a concern for 66% of respondents in the survey. This view was corroborated in the group interviews where teachers made several references to issues regarding other staff members "*not pulling their weight, and getting away with it*", which they partly saw as a management responsibility. When reading the teachers' words in the responses in the group interviews (Appendix 12), it did seem that this was a major problem for some, especially as they had no control over the situation. There were several questions related to factor 3 which were not relevant to all teachers, for example, the senior management team, cluster support staff, nurture support teachers, supply teachers and to some extent, probationers. This may have affected the mean stress

score for some variables, as there appeared to be a pattern among respondents who reported a low mean stress score, in that they were not full-time class committed.

7.2.3 Factor 4: school environment

Factor 4 in the questionnaire was related to the school environment. While nine respondents in the study reported a mean stress score of 4 for this factor, indicating no stress, stress was reported from over 50% of teachers for each of the four variables: *Having to teach in cramped classrooms; poor staff / pupil ratios; class size; the poor physical condition of the work environment.* Just under two-thirds of the sample was stressed by "class size". Class size is related to raising attainment in education (section 1.3.1 Gillies, 2008,) and has been an area of debate for some number of years in terms of effects of class size differences in primary schools.

There is consensus among many in education that smaller classes allow a better quality of teaching and learning, especially in the initial years and for pupils who have low attainment in language (Blatchford, Bassett Goldstein and Martin, 2003). This view has led to policy in favour of small classes. The policy is contentious, with some arguing that the effects of class size reduction are modest and that there are other more cost effective strategies for improving educational achievement, for example increasing teacher effectiveness (Rivkin et al, 2005). This opinion is favoured by politicians in all countries in the UK where governments now appear to be back-tracking on their initial proposals to reduce class sizes, arguably due to the cost of implementation. The new Scottish parliament was strongly committed to

reducing class sizes, especially in primaries 1 – 3. The 2007 Concordat [5] stated that the Scottish Government would move swiftly to reduce class sizes to 18 in P1 to P3. This goal has not been achieved. However, from August, 2011, the legislative maximum for P1 classes was reduced from 30 to 25; the recommended number for P2 and P3 is 30 and for P4 – 7 it is 33.

Reducing class size to the point where it may have an affect on pupils' achievement may be prohibitively expensive in today's economic climate. There are enormous resource implications i.e. teachers, whose salaries are a major part of spending on education. Controversially, perhaps teachers are not so much referring to the benefits to pupils, but to themselves, when they argue for smaller class sizes. Having larger numbers of children in a class may increase workload in terms of time spent on preparation, marking and administration; which may in turn lead to stress. In the group interviews, this appeared to be a major issue for Irene:

> *I also experience stress in my job to complete tasks within a timescale. Such as report cards, parents' night, ASPs. All of the above are within my remit, however, I for example have 31 children, some of my colleagues have 18 children. Yet the allocation of time given is the same. I can find this* stressful".

It may also be easier to mange pupil behaviour in smaller classes, especially with the most recent changes in teaching strategies, for example, to active learning, where "hands on" and group experiences may be more difficult to organise with larger numbers.

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[5] The Concordat was agreed between the Scottish Government and COSLA in November 2007 and included a number of policy commitments which would be delivered by local government, supported by the local government funding settlement

7.2.4 Factor 5: changes taking place within education

For factors related to change, each of the variables in Table 10 (section 6.2.5) had a mean stress score greater than 2.00, indicating they were issues for the majority of teachers. Overall, about 91% of respondents reported feeling stressed through addressing the policy on inclusion; with 38% of teachers reporting stress at level 4. Gillies (2008) opined that the closure of many special schools is linked to the financial debate in education, the purpose of which is to keep public spending as far as possible to a minimum (section 1.3.1).

In the interviews, Adele reported:

> *"Discipline issues bring about stress too as you become frustrated at not being able to teach properly without constant interruptions from disturbed children who in turn upset the rest of the class"*.

In answering what caused her stress, Frances stated:

> *"the policy on inclusion – pupils who at one time would have been in special school – time spent planning for and teaching individual children out of proportion to that allotted to other pupils"*.

The Warnock Report (1974) followed by the Education Act (1981) led to the move towards integration of pupils with various forms of learning disability into mainstream classrooms so that "*failure to learn*" would be due to the nature of instruction, understood as a task for all teachers and not just specialists (Galton and MacBeath, 2008, p.58). However, Dame Mary Warnock (2005) reportedly now has some reservations concerning the policy that followed her report. The use of the generic term Special Educational Needs (SEN) has disadvantaged children whose needs are not being met, as has the policy of excluding from the category, pupils with English as a second language and pupils living in particularly deprived

circumstances. Both of these decisions had a financial basis, thus many schools do not receive the additional resources they need (Galton and MacBeath, *ibid*).

Anecdotal evidence supports the claim that there has been an increase into mainstream schools of children with "contemporary" disabilities, for example, autism, ADHD (attention deficit hyperactivity disorder) and asperger syndrome and in general, teachers are not trained in how to deal with pupils with such psychiatric disorders. The physical disability of a child can be obvious and children's needs are usually addressed before they enrol for school, both in terms of the environment they will enter and in terms of staff trained in their support. This is not always the case with children with emotional/behavioural difficulties; often the first signs of a problem can be when they "kick off" unexpectedly and with no apparent reason. Diagnosis of their problems is often delayed until a stage is reached where teachers can no longer cope and often the pupils are labelled as badly behaved. Many repondents in the survey agreed that the number of pupils experiencing social problems was increasing and all agreed that the range of social problems faced by pupils had increased, leading arguably to deterioration in classroom behaviour, which many teachers find difficult to endure and for some, is the reason they give for thinking about leaving the profession (7.2.1)

A large majority (89%) attributed stress to the constant changes taking place within the profession, with more than one-quarter reporting stress at level 4 (Table 10, 6.2.7). This issue has been a constant over a number of years (Dunham, 1992; Johnstone, 1993; Travers and Cooper, 1993; Galton and MacBeath, 2008). Similar

to the findings of Travers and Cooper (1993), many teachers in the current study (84%) had issues with the lack of information on how changes were to be made, including the teacher who stated "*… too many new initiatives introduced without proper consultation or training*". As predicted by the *demand-control model* of stress (4.2.3), not being in control of their work is a significant cause of stress, exacerbated by the pace and manner of change and inadequate support to meet those changes.

Change is an essential part of growth in any education community. At an individual, basic level, it can be seen in classrooms each year, as teachers make decisions, adapting style and pace of teaching to suit the needs of pupils. Where issues can arise, is with the direction, pace and management of imposed change (Gavin, 2003, p461). There is a sense of déjà vu in respect of these problems. In the 1960s and 1970s, the consecutive introduction of comprehensive education and the raising of the school leaving age to 16, left local authorities and teachers initially wanting in their preparation to meet the challenges of these imposed changes; within two decades, in the early years of implementing the 5 – 14 Development Programme, teachers were concerned, inter alia, over inadequate resources and in-service training (section 2.4). Arguably, this was the onset of pressure for teachers in terms of time and volume of work associated with change. One of the greatest pressures reported at the time by all school staff was the time scale set for the implementation of the 5 – 14.

Reference was also made by Malcolm and Schlapp (1997) to the need for non-teaching time required, assimilating documentation related to new concepts in curriculum, in record keeping, assessment and reporting. A further 15 years on, it appears the pressure from change has not abated, with little control over the academic curriculum, and little opportunity to affect decisions about resource allocation being reported in the current study (Table 10, Table 12; 6.2.7). Fullan (1996, cited in Wilson, 2002) postulated that structural reforms lead to work overload and stress because teachers experience them as fragmented and incoherent, innate problems in any "top down" systemic change, where only a few in key positions may hold a vision of the wider picture. Fullan proposed that collaborative networks (a characteristic of the local authority in recent years) would give teachers more influence over change and increase their feeling of ownership of the change.

Timperley and Robinson (2000) cite research which showed that as local involvement in management of schools increased, so did the percentage of time teachers spent on non-teaching tasks. Hall et al's (2000) workload survey of Scottish teachers confirmed these findings. However, Timperley and Robinson take a controversial stance on this issue and argue that teachers not only suffer from workload problems but also create them, since organizing principles developed to meet the challenges of managing single-cell classrooms, such as individualism, autonomy and strong subject department identity, discourage the systemic thinking required for developing consistency in reforms which go beyond the unit of the classroom or department. When reform requires a systemic response, these organizing principles are likely to result in increased workload through

fragmentation, duplication of effort and the addition of new tasks to those already existing. This reasoning may explain why teachers feel stressed from extra workload related to the development plan, working parties and other collaborative tasks (Table 12; 6.2.7). Interestingly, it was not only accomplished teachers who reported stress associated with change; several respondents who had been teaching for less than 5 years reported a negative response to the pressure from change they had experienced in their relatively short teaching life.

7.2.5   Factor 6: appraisal of teachers

Factor 6 in the questionnaire investigated the effect that appraisal had on teachers. Five variables were considered to be traditional in teaching (Table 7, section 6.2.5). Inspection by HMIE (89%, n=50) was a major problem for many teachers (48% reported stress at level 4); as was stress from the paperwork associated with assessment (93%, $n = 52$). In her 2002 review, Wilson found that the English system of inspection introduced in 1992, the Office for Standards in Education (OFSTED), was quite traumatic for teachers and the term "post-OFSTED blues" was used to describe feelings of exhaustion, lack of motivation and for some, depression that followed inspections.

Despite a lack of evidence of this impact in Scotland, teachers generally view HMIE as agents of state control, who will "*measure, judge and control them*" (Weir, 2008, p.143). Two cluster support teachers, among those who reported the lowest mean stress score overall, reported that inspection by HMIE and the need to continuously maintain a high standard were the variables that gave them higher levels of stress.

Although they felt little or no stress from interaction with pupils or the structure of the school, they were perhaps more aware of accountability, as they visited several schools each week, and thus, may have been involved in more assessment than mainstream school staff. Draper and McMichael's (2000) study found that although headteachers and teachers acknowledged the importance of accountability, excessive paperwork combined with constant pressure to justify one's teaching, led to a feeling of not being control of one' s own destiny.

Table 11 (section 6.2.5) shows the results of appraisal of teachers related to new policies. Similar to HMIE inspection above, undergoing an establishment review was the main stressor in this section, with around 90% of respondents reporting it as a source of stress. Seven out of ten variables had a mean stress score greater than 2.00. Each of these variables was linked to raising standards, for example, having to achieve targets for national test results, having to produce evidence of what has been taught and assessed. Galton and MacBeath (2008, p. 5) point out that classrooms are now more transparent than previously and teaching and learning are under almost constant scrutiny. Long lists of stakeholders are encouraged to hold teachers to account for the "delivery" of the curriculum and the perpetual raising of standards. Up until 2010, each year schools in Scotland were required to meet higher targets for attainment in reading, writing and maths (as prescribed by 5 – 14); despite the fact that each year brought a different set of pupils with different needs and ability.

Today's children and young people engage with more attractive alternatives to what school has to offer. Yet, governments continue a regime of stricter testing and put

ever-increasing pressure on teachers to prove themselves against benchmarks, best practice and mandated criteria of effectiveness, for example, initial teacher qualification, standard for full registration; standard for chartered teacher; standard for headship (Galton and MacBeath, *ibid*).   In the interviews, appraisal was on the minds of teachers when thinking about stress. Adele defined stress in terms of "*worrying about delivering the curriculum properly*"; Helen too, worried about appraisal "*stress is all around me…… I have to assess and be accountable*". Teachers reflected on their performance, for example, Adele felt stressed by new areas of the curriculum which required a lot of reading "*this has to be done in order to feel confident about your teaching and produce quality work*"; and Carol when evaluating her terms work reported "*I feel stressed when I revised areas of the curriculum that I haven't taught well – i.e. I.T*".

7.2.6   Factor 7: the concerns of management

The demand-control model of stress predicts that the most adverse health effects of psychological strain occur when job demands are high and the opportunity to make decisions is low (4.2.3). Conversely, the high demands associated with prestigious jobs are mitigated by the great deal of control that also characterises those jobs. In the sample, only nine respondents answered the questions linked to the concerns of management, thus the sample is too small for the results to be statistically significant. Nonetheless, the positive effect of the high demand / high control model was not evident among the senior promoted staff in this study. Four respondents, who were members of the management team in their schools, were among those reporting the

highest overall mean stress score in the survey (Table 21); none of these nine teachers were in the group of five who had the lowest mean stress score (Table 22).

A further important point in relation to this model is that it does not take into account individual characteristics as contributing to stress. Decision latitude and control are seen as characteristics of the job itself, not of the individual (Guglielmi and Tatrow, p.62). The variables in factor 7, reported with the highest mean score was "*constraints of the local authority*" and "*demands of the local authority*". The introduction of a market economy into education (2.2) may perhaps have brought more responsibility than power for staff. So, despite apparently having overall control of their schools, management teams may feel they are subject to the dictates of the government and local authorities.

Workload was also an issue for most of these respondents, particularly long hours and paperwork, a further effect of a consumer-oriented economy education system (section 2.2) which has arguably brought a need to work longer and more demanding hours. Since they have overall responsibility in terms of the success or failure of their schools and delivering the targets set by outside agencies, as might be expected, head teachers and depute heads were stressed over HMIE inspection and matters related to national testing.

7.2.7 Factor 8: workload

Workload has been identified as an occupational stressor, "*topping the bill*" in many studies of teachers' professional lives (Galton and MacBeath, 2008, p.12). That

workload was a source of stress for respondents in the study is confirmed by the results of the questionnaire. To determine whether perceived stress was attributed to traditional job related factors or derived from new policies, for analysis, factor 8, workload, was split into features that were in place before (Table 8, section 6.2.5) and after the new policies were introduced (Table 10). Both sets of variables generated reports of stress. All variables had a mean stress score greater than 2.00. Time pressures, too much work and paperwork – factors reported in previous studies - were reported as the most stressful variables, with ten respondents feeling stress at level 4 from the three variables stated.

When comparing intrinsic and contemporary issues associated with workload, the difference lies in the number of teachers who reported stress at level 4. Teachers reported experiencing the highest level of stress for many of the intrinsic workload variables. *Extra workload related to the development plan* and *pace of work to improve attainment* are two contemporary variables that generated the highest level of reported stress, with between 18% and 20% reporting stress at level 4. Teachers who intended to take early retirement reported "*Overloaded curriculum* and *too many new initiatives*" as contributing factors. It was also cited by one teacher as a reason for not pursuing the SCT "*Overloaded curriculum, so not enough time to devote to doing my job properly, CT would dilute this further*".

Interview data show that workload was a significant cause of stress for some teachers in terms of issues of accountability and bureaucracy, time pressure and to some extent, the curriculum.

Adele stated:

 "Stress is feeling overburdened with tasks to complete. New areas of the curriculum take time to teach as there is a lot of reading to be done beforehand".

While Helen seemed to be under pressure from a series of issues:

"Stress is all around me at work. I have to meet deadlines, deal with difficult behaviour, plan lessons, asses and be accountable".

Irene too, found time pressure added to workload stress:

"I experience stress within my job to complete tasks within a timescale".

Excessive paperwork coupled with a constant pressure to justify one's actions may lead to feelings of not being in control of your professional environment.

Interestingly, Travers and Cooper (1993) reported workload, in the form of non-class contact time (NCC), among the variables providing most stress. Part of the McCrone Agreement was an entitlement to 2.5 hours of NCC per week, which potentially should have reduced teacher workload (at the time of the study, this was partially in place as 1.5 hours per week). In the likert type scale linked to new policy (Table 19), about 58% of teachers considered it were not always possible to get NCC time each week, which may partially explain why workload was reported as a major issue. Variables related to workload which may have eaten into teachers' personal time included paperwork, assessment, administration tasks and forward plans, leading to 89% of teachers reporting they considered that work requirements could not be completed within the contractual 35 hour working week. This view is upheld in research commissioned by the Scottish Negotiating Committee for Teachers (SNCT) (Menter et al, 2006), whose aim was to provide the SNCT with evidence on whether

commitments on teachers' working week had been met following the McCrone Agreement. The research found that the majority of teachers felt their workload had increased since 2001, and the amount of time needed to undertake tasks associated with carrying out a teaching role was in excess of 35 hours. In addition, a significant number of respondents reported they considered their work load to be unsustainable.

In 2008, Galton and MacBeath's research concurred that the introduction of time set aside for preparation and planning in English schools had not necessarily reduced teachers' overall weekly workload. It is arguable that while staff in the current study appreciated the reduction in direct teaching, the extra time needed to assimilate the workload associated with initiatives, or the job of teaching, was greater than the 1.5 hours of NCC time allotted (at that time). In his research (section 2.2.6), Dunham concluded in 1992, that the time required by teachers for all tasks could not be lengthened because of the fixed number of hours in the school week. Therefore, when time needed to be appropriated outside of school, it was likely that time would be taken from that usually spent with family, on exercise, relaxation or sleeping. Only 12 (21%) respondents in the current study reported experiencing no stress from personal life interferences, perhaps indicating that workload factors were spilling over into teachers' private lives. In the interviews, Carol, who job-shared, hints at this by explaining that:

> "*I try not to be in school any later than 4.15pm, even if it means taking work home with me. The work I do take home is stuff that doesn't need a lot of focus/concentration to do. I try not to do any school work on my non-teaching days. I will only start to look things over on a Sunday night, but **never** on a Saturday*".

The findings of this study mirror Johnstone's 1993 Scottish study on workload and stress. Perhaps not surprisingly, given the topic of Johnstone's research, workload accounted for 47% of the overall causes of stress reported during the week of the study, in terms of frequency of occurrence and cumulative effect.

7.2.8 The attitude scale

The discussion now moves to issues reported in the attitude scales (section 6.2.9, Table 16 - 21). As a reminder, responses were processed using the SPSS package for quantitative data analysis, which again made it possible to calculate the mean score and standard deviation of the variables. The response scale for the tables and figures are strongly agree (SA) = 1; Agree (A) = 2; disagree (D) = 3 and strongly disagree (SD) = 4. Much of the discussion here is linked to tables 16 – 19, in section 6.2.9.

The vast majority of teachers (about 95%, *n = 5*) considered that being a good teacher did not in itself lead to promotion, with about 82% (*n=46)* reportedly believing that despite the revised career structure derived from the McCrone Agreement, there were still too few opportunities for promotion. This point was reflected in comments by several teachers: from one who was considering retirement "*Opportunities are no longer there for people 45 – 55yrs although these are the <u>most experienced</u> people in the schools*"; and from a cluster support teacher, commenting on future career development: "*no promotional prospects within cluster support; will not pay for CT route*", and from a teacher who was initially considering CT: "*as there are less promotional prospects in management*".

The *effort-reward* stress model (section 4.2.3) assumes that emotional distress and adverse health symptoms occur when there is a perceived imbalance between effort and occupational rewards –which is evidenced in the study. In addition to lack of promotion opportunities, teachers had issues related to their salaries, a lack of status and respect from the general public. Coupled with worry over redeployment and job security, teachers may be at risk of suffering the ill-effects of stress. Galton and MacBeath (2008) highlight the fact that there are mitigating features in the job of teaching. For many, the intrinsic value of teaching, for example, seeing young people learn and grow outweighs issues of money or career prospects. In industry, job satisfaction has been shown to increase productivity. Sadly, however, about half of the sample did not feel that the effort they were making was having a positive impact on pupil learning (the product of education). Almost 70% of respondents opined that initiatives introduced through the National Priorities had not succeeded in raising attainment. A majority agreed that a large number of teaching and learning initiatives had been introduced and a small minority reported a positive effect of the new learning / teaching strategies in terms of feeling they were a more effective teacher. However very few reported confidence in teaching the initiatives, perhaps linked to less than one quarter of respondents reporting that there had been adequate CPD to implement the initiatives effectively.

This feeling of a lack of success may be exaggerated due to some, but not all, schools in the survey being situated in one of the most deprived datazones[6] in Scotland in terms of levels of employment, health, and education deprivation. HMIE's report,

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[6] The Scottish Index of Multiple Deprivation identifies small area concentrations of multiple deprivations (called datazones) across all of Scotland in a consistent way.

Improving Scottish Education, a substantial review spanning the years 2002 - 2005, concluded that underachievement was endemic and that some of the causes lay outwith the control of teachers, since the highest proportion of low-attaining pupils live in the most deprived areas of Scotland. Despite these problems, the vast majority of respondents felt satisfied with their job, felt enthusiastic and enjoyed their job; only a small proportion were considering leaving the profession.

7.3   Sub-question 2   What kind of experiences of stress appear in teachers'
       accounts?

The findings from the teachers' accounts were reported in 6.3 and should be looked at together with appendices 7 – 14 for a full explanation of how the data were analysed. Many of the teachers' comments have been discussed above and it was evident from the accounts that teachers were feeling stressed by a variety of issues, namely workload, the curriculum, assessment and accountability, report writing, parents nights, the development plan and lesson preparation. However, several more points of interest are discussed below.

Many words with emotional force were used in answering interview question 1: *What is stress?* Words and phrases such as "*feeling overburdened; worrying about the demands…the curriculum; pressure on mental and physical energy; exhaustion caused by this; overload and anxiety; feeling that you can't cope*" were used in response to the question. Physical symptoms were also attributed to a description of how stress was viewed: "*stress is insomnia, lack of concentration, bad temper, swearing*". It is acknowledged that stress is an individual response to an

environmental stimulus and that the sample as a whole may not have the same view of stress as those in the interviews, but this perception is closely linked to that of the small number from the general public who were asked the same question e.g. stress is: *Lying in bed unable to sleep thinking about problems needing sorted; a frightening and worrying experience, feeling anxious and unable to concentrate*". What is of concern is that teachers, who experience these symptoms over a prolonged period of time, run the risk of contracting serious health problems.

One recurring theme identified in the causes of stress, question 2, was linked to a lack of control. As previously discussed, stress is highly correlated with the amount of control one has over decision-making (Galton and MacBeath, 2008, p.9). Its effects may be felt strongly among staff who see themselves caught between accountability for teaching and learning, and events which may prevent effective teaching and learning from taking place. Thus factors outwith their control, overburdened with tasks or constant interruptions, may interfere with their ability to gain a sense of achievement. Examples of incidence of lack of control references in the accounts included "*feeling of overload, anxiety when I am not in control of what I have to do; discipline issues... you become frustrated at not being able to teach properly; tasks/ meetings etc arranged with insufficient notice; absences, time keeping (of children); coping with other staff members who are not doing their bit. In a school like mine, there are timetables for everything, people don't stick to it; some staff don't pull their weight and get away with it – e.g. sharing responsibility in working parties and report writing; when staff do not follow what we have agreed as policy, but go off and do their own thing, especially when it is a matter of discipline*".

Disruption of lessons by pupils and disruption of administration procedures by other staff seem to imply that it is the disruption of planned work, leading to frustration and loss of control that are the causes of some stress. Or possibly, irritability with, or intolerance of others, may be a symptom of overwork and stress. Many of the respondents who appeared to express a lack of control in their work, also made reference to workload issues. A further theme that emerged from the accounts was a sense of self-evaluation and low self-esteem. Several teachers in the study alluded to worry over doing the job properly, essentially in relation to delivering the curriculum effectively and their ability to complete tasks on time. Adele worried over the demands that were put upon her and worried "*about delivering the curriculum properly*". Debbie's feeling of overload and anxiety occurred when she "*was not in control of what she had to do*" reflected a feeling of incompetence. This was also voiced by Evelyn who recounted "*feeling that you can't cope and are not doing well*". There were signs that Helen's self-esteem was also affected when she reported "*stress is a lack of communication that in turn makes you feel incompetent*". Some teachers reported feeling stressed by the amount of work that needed to be done in order to feel confident in their teaching; and another admitted to feeling *inadequate* at times, in dealing with pupil misbehaviour.

Then again, a sense of the caring attitude that prevails in teaching was expressed by some teachers; although it was also a source of pressure. In the questionnaire, the one area that all respondents agreed upon was that pupils were experiencing an increased range of social problems. This was echoed by Betty who felt pressure in her job in relation to the curriculum and in terms of absences and timekeeping of

235

pupils. She also worried "*in some cases about the home life of children. How to help children with special needs, physical welfare of children and how to build on mental capabilities, how to deal with social/behavioural issues*".

An encouraging feature in the accounts was the level of coping strategies adopted by the teachers to combat the effects of stress. A mediating factor reported in previous research (Travers and Cooper) was support from friends and colleagues and this was evidenced by this group of teachers by way of "letting off steam" in the staffroom and by maintaining a social life. Almost all teachers were involved in a form of physical activity that mediated the effects of stress. There was good evidence of teachers taking positive measures in an attempt to alleviate the stress in their lives, for example, through trying to be better organised, adopting strategies to mitigate misbehaviour and doing less work at home. One teacher from the secondary school showed awareness of the importance of colleague support in mitigating the effects of stress. He added the comment at the end of the questionnaire that the school had a very active social group that participated in 10 pin bowling, karaoke and sports activities, all of which helped combat stress.

7.4   Sub-question 3

 Is there a relationship between career development, CPD and workload stress?
The answer to this question is primarily found in responses to the open questions 1.10, 1.11 and factor 12, CPD, found in sections 6.2.14, 6.2.15 and 6.2.16.

7.4.1   Career path

It may be of little consequence now, as the CT scheme has been rescinded, however, very few teachers showed an interest in CT status. This appeared to be a general feeling throughout the teaching profession as these results mirrored those found in Audit Scotland (2006), and a North Lanarkshire survey of the implementation of the McCrone Agreement (2006). The principal reason against CT for the respondents (and also in the reviews mentioned) was the financial outlay. Several reasons can explain this attitude: first, teachers may be unused to paying large sums of money for CPD and probably more so when, following the introduction of the initiatives in 2000, CPD was prolific and teachers attended courses during the school day. Second, teachers did not think about the increase in salary that achieving SCT would bring. A further reason for lack of interest in the CT programme was linked to workload. Several teachers reported that they were already feeling stress from the work they had to do and were not prepared to take on an extra burden.

The route to management was the preferred career development choice for about one-third of teachers not already in a management post. Several thought there was more status attached to promotion; they wanted an opportunity to manage, feeling that they had leadership qualities, and bring about change, besides earning a larger salary. Seven of the male teachers (54%) who were not already in a promoted post, including some who had been in teaching for only a short time, reported that they wished a career in management; despite the fact that more than one of these teachers reported a very high stress score. Two teachers intended to use the CT scheme as a

stepping stone to management as they felt there were few promotion opportunities at that time.

7.4.2   Continuing Professional Development

Although 13% of respondents in the study reported that they were not prepared to commit to the burden of study required for CT, the research suggests that teachers do spend more than the 35 hours minimum annual requirement for CPD (Appendix 20). For the majority of teachers, CPD was related to professional reading and curriculum development linked to national and local policy initiatives, and teachers also undertook a wide range of developmental skills training in ICT. Few teachers from the learning communities had undertaken award bearing courses. This may be because they already felt pressure from the workload they had and could not reasonably make time for more.

Six teachers had been recruited to the study with the help of the university staff. These were teachers who were studying for the higher degree of Ed.D or M.Ed and were located across the central belt in Scotland, thus they were able to contribute to a general picture of occupational stress among teachers. Once more the sample is too small to make any claims from the findings. In general these respondents reported a low mean stress score overall, despite the heavy commitment to CPD; some reported as much as 700 - 800 hours per year. Variables from which stress was reported included long hours, paperwork, assessment, class size, pupil misbehaviour, accountability and inclusion. Most of the respondents reported a negative attitude to

new policy statements; particularly they did not feel that attainment and achievement had been raised since the introduction of the national priorities.

7.5 Curriculum for Excellence

A subsidiary piece of research was undertaken during 2011 – 2012 to include the latest innovation, Curriculum for Excellence, in the study (section 3.8). The research took the form of one open question, which asked teachers to state their initial impressions of CfE and how it impacted on their teaching. A clear pathway of analysis is outlined in appendices 15 – 15d, but due to the lack of response – only seven teachers replied to the question – and the implications this has for the validity and reliability of the data collected, although interesting in itself, a brief summary only, is included here.

An overall impression gained from the text of the transcribed questionnaire data, was that CfE had had a positive reception by teachers, especially in terms of the greater freedom of choice over the teaching that took place in their classrooms. Some teachers thought it was an excellent curriculum for Scotland and that it provided great scope for creating new and engaging learning opportunities for children. One teacher considered that CfE had been inspirational in changing how staff in her school planned opportunities for children's learning, while one other, although very impressed by CfE and the theory behind it, was concerned as a parent that there was a lack of consistency across the three sectors, nursery, primary and secondary, that CfE encompassed.

In the main part of this study, "lack of control" was identified as a factor which predicted occupational stress. It was, therefore, interesting and encouraging in terms of possibly reducing occupational stress, to see that several respondents thought that CfE was allowing them more scope for personal choice, and thus control, in the curriculum. They welcomed active learning and the use of an interdisciplinary approach as well as an end to the so-called "balance of the curriculum" - a feature of the previous 5-14 curriculum, which meant for Janet, as a probationer, she "*was expected to stick rigidly to set hours and set resources for each area of the curriculum*". Teachers felt encouraged that they were able to bring more of their own knowledge and experiences to the forefront and to plan programmes to suit their pupils' experiences and learning styles. They were happy to try to encompass "*all the extra bits*" into teaching topics, e.g. ICT and Enterprise - rather than these being taught discretely, making natural links across curricular areas.

Teachers reported that the outcomes and experiences from CfE formed the basis of planning relevant and motivational long and short-term learning experiences for pupils. The addition of active teaching strategies made learning more "*engaging, interesting and inclusive*" for pupils. Some claimed that CfE provided a framework for pupils to achieve the four competences by designing challenging experiences, including working with outside agencies to gain a perspective of a wider society. Teachers' reports emphasised the importance of learning being relevant to pupils, of a focus on skills that would be useful in pupils' later personal and work life.

Planning attracted some negative response, for example, that from necessity, schools were involved in developing individual planners, particularly for numeracy and

literacy. Some teachers thought that the outcomes for literacy and numeracy provided little detail for progression of skills, and that there was a need for each school to develop its own planners. The concern lay in the fact that, while the outcomes remain constant across CfE, interpretation and experiences may not, and as a result there may not be consensus, particularly in assessment, even across schools in the same learning community, leading to the possibility of disparity of standards across schools and local authorities.

As with previous changes, there was criticism of a lack of funding for CfE. There was a lack of equipment that worked and was reliable, for example, banks of computers with high speed broadband, affordable printers, Smartboards and projectors and a budget for the basics such as photocopying and laminating. This response may suggest that staff did not have confidence to change their pedagogy because they anticipated resourcing difficulties with the supporting technology. Frequent use of new technology builds proficiency and confidence in users, but sharing one Smartboard among three or four classes of thirty children can lead to frustration in the amount of time it takes to set up programmes on slow running internet links, which in turn can lead to behavioural problems among pupils.

One experienced, secondary teacher reported that CfE was "*a Very Good/Excellent idea that had been poorly funded and poorly planned in its implementation*". Other major developments in the secondary sector had received practical help from the SQA, for example, for Standard Grade and latterly for Higher Still, but LTS (now incorporated into Education Scotland) appeared to be struggling to keep up with CfE.

This view was partially upheld in an audit "Progress in preparing for the implementation of Curriculum for Excellence in Secondary Schools" published by Education Scotland in May 2012. The report stated that almost all secondary schools were making good progress in preparing for delivery and implementation of CfE. However, there was a need over and above the extensive planned EA and national support already given, for Education Scotland and other national bodies such as SQA to provide additional support for secondary schools and EAs in a number of specific areas. This support is required in relation to aspects of some new National Qualifications, assessment, moderation and quality assurance, how best to deliver a Broad General Education S1 to S3 and how best to structure and deliver the Senior Phase.

Workload appeared to be an issue in terms of planning and resourcing new material. Teachers reported that as working with CfE has progressed, some had found it necessary to provide supplementary material to ensure depth and progression in their teaching. One teacher reported that focussing on the outcomes from CfE helped him to continually reflect upon how he provided experiences that were "*relevant and motivational to the children in my class and not based on a universal planning document*". Although he is enthusiastic about doing this, it is a "*time consuming process*" and that a great deal of thought went into planning and creating "*new, engaging activities*" before they could be taught, but this process "*consumes many hours*".

Other teachers were also concerned about the training they had received to deal with CfE effectively. Two extra days of in-service training had been allocated for two years for CfE. However, these days "*had been of no significant value. We sat and listened to the theory, studied those ridiculous gigantic outcomes posters*". The preference would have been to work together in teams to plan and develop "*good quality integrated* topics. Many developments were being put in place to support the changes linked to CfE, but they were poorly funded and implemented. "*Throughout the years, there has always been a big push on new ideas/concepts but then* (they are) *put on the back boiler*". The negative reports are of concern as they come from teachers who appear highly committed to CfE and are excited by the opportunities it offers.

7.6   Summary

This chapter discussed the findings from the data in the study in relation to the research questions. In conducting this research it has been possible to identify sources of stress, both intrinsic and contemporary, which teachers claimed, caused them stress in their working life. Findings from the Likert scale revealed both positive and negative attitudes towards initiatives introduced by the new Scottish Parliament. The findings from the study show that stress was felt by both primary and secondary teachers and that some types of jobs may be less prone to stressful outcomes than others. Many of the reported sources of stress were upheld by evidence gained from a small number of teachers' accounts. Potential risk to health was recognized in the expressions of the concept of stress by some teachers, but an awareness of the need for mediating risk factors was also identified.

From the responses that were received, albeit from a very small number of teachers, it appears that teachers are generally in favour of CfE and are working well to provide interesting and engaging lessons for pupils. There are however, some issues linked to planning formats and the workload that change in pedagogy brings.

Chapter 8 draws together conclusions from the research study overall. It concludes by restating the importance of the study, its limitations, an appraisal of the methods and possible recommendations for future practice.

Chapter 8   Conclusions

8.1   Overview

The conclusions and importance of the study are presented, followed by an appraisal of the study limitations. The chapter ends with recommendations and personal reflections.

8.2   The research conclusions

8.2. 1 *What are the origins and causes of reported stress, particularly in relation to policy?*

 Evidence from the questionnaire confirmed that teachers were reporting feelings of stress. The ongoing issue of pupil misbehaviour was reported as a source of stress for teachers. Where it differed from research previously reported by Johnstone (1993) was in the type of misbehaviour. In the current study the majority of teachers reported stress from teaching pupils who do not value education and from increased aggression shown by pupils, rather than continuous episodes of minor offences. The geographic location of some schools, in one of the worst datazones in Scotland in terms of levels of employment, health and educational deprivation (section 7.2.9), may have impacted on these findings, since there may be households containing second and third generations of unemployed persons. In the past, doing well at school was regarded as a guarantee of a job when leaving. That has not been the case for some years due to the economic climate; therefore some pupils may think there is no point in trying. Addressing the policy on inclusion, which is linked to pupil misbehaviour in some respects, was reported not only as an issue for 91% of respondents, but was also reported at the highest level for 38% of teachers. Possible

reasons for this finding are discussed in 7.2.4. All respondents agreed with the statement that the range of social problems faced by pupils had increased and this issue was found to have contributed to some teachers' decision to retire early from the profession.

In addition, the study found that the constant changes taking place within education were a source of stress for many. As acknowledged by Gavin (2003), change is an essential part of growth in any community; however, as predicted by the *demand-control model* of stress (4.2.3), not being in control is a significant cause of stress for some, exacerbated by the pace and manner of change and inadequate support to meet those changes. A traditional aspect of school life, inspection by HMIE was reported as a significant stress factor for the majority of the sample, as was the more recent policy of an establishment review, carried out by the local authority. The demand-control model of stress predicts that the most adverse health effects of psychological strain occur when job demands are high and the opportunity to make decisions is low (4.2.3). From this one would have expected that teachers in senior management may have reported a low mean stress score. This, however, was not the case. Four members of senior school management teams were among those who reported the overall highest stress scores. Being in a position of overall responsibility, management reported stress from HMIE and national test results. Findings show that the variables which they found stressful were demands of, and constraints by, the local authority. A reasonable conclusion from these findings is that despite having devolved power for some aspects of school business, management have more responsibility than actual power.

The majority of variables with the highest reported mean stress score are related to workload. They were *time pressure, too much work, inspection by HMIE, paperwork, addressing policy on inclusion, time management, assessment and the associated paperwork, long hours, constant changes taking place within education and dealing with pupils who do not value education* (table 13 in 6.2.8). This finding is perhaps not surprising, given its frequency reported in previous research. Other variables were related to traditional aspects of the job linked to accountability and pupil misbehaviour, and constant changes in the profession. Initially it appears that teachers in the study reported higher levels of stress derived more from traditional stressors than from policy change; however *time pressure, too much work* and *paperwork* may be associated with aspects related to initiatives such as development work and ASPs. The results from the attitude scale need to be taken into consideration before arriving at a clear conclusion.

The McCrone Agreement was intended to make teaching a more attractive career option and address recruitment difficulties. An integral part of the Agreement was a commitment to develop and support teachers, as described in 3.2.1. The study found that teachers did not think these changes had been effectively put in place. The vast majority thought that being a good teacher did not necessarily lead to promotion and that there were still few opportunities for promotion. The *effort-reward* stress model (section 4.2.3) assumes that emotional distress and adverse health symptoms occur when there is a perceived imbalance between effort and occupational rewards – which is evidenced in the study. Pressures from issues related to salary, a lack of status and respect from the general public and the perception that the effort they were

making was not having a positive impact on pupil learning, are implicated in negative stress outcomes; this conclusion is supported by almost 70% of respondents who were of the view that initiatives introduced through the National Priorities had not succeeded in raising attainment. This feeling of a lack of success may once more be attributed to the geographical location of the schools.

A more varied picture emerged when evaluating the effectiveness of new teaching and learning strategies. A small minority reported a positive result in terms of making them a more effective teacher; while others had less confidence in teaching the initiatives; claiming that there had been inadequate CPD to implement the changes effectively. Overall, the study revealed that teachers showed a generally negative attitude towards the statements associated with policy change. One of the major findings in the study was that 90% claimed their work requirements could not be completed in the 35 hour contracted week.   In addition respondents were divided as to whether getting NCC was always possible.

8.2.2   *What kinds of experiences of stress appear in teachers' accounts?*

The findings from the teachers' accounts corroborate to some extent the findings from the questionnaire. Throughout the accounts (appendices 7 -14), teachers expressed concern linked to workload, the curriculum, assessment and accountability, report writing, the development plan and lesson preparation. The negative definition of stress given by respondents matched that given by the small number of the general public before the study began. One finding which raises

concern was the emotional force of words used to define stress and its effects, reflecting the potential risk of repercussions in terms of negative health outcomes.

A lack of control over their work was a recurring theme for some teachers, a factor highly correlated with stress. In corroborating findings from the questionnaire, teachers expressed a lack of control in their work, mainly with reference to workload issues linked to time pressure "*under a lot of pressure to complete, I experience stress within my job to complete tasks within a timescale*" (Irene, Appendix 7). It can be inferred that teachers who are faced with issues outwith their control and who are overburdened with tasks or interruptions to their work, may lack a sense of achievement in their job "*feelings of overload, anxiety when I am not in control of what I have to do*" (Debbie, Appendix 7). An additional theme found in the accounts was low self-esteem, characterised by feeling unable to deliver the curriculum effectively, complete tasks in the given time, deal with pupil misbehaviour and a lack of communication. Two positive factors were found in the accounts: (1) a sense of the caring attitude that prevails in teaching, and (2) the level of coping strategies adopted to combat the effects of stress. This was reassuring, as exercise, relaxing and taking positive steps to mediate stress can relieve high blood pressure – a possible side effect of stress; however the study also found that there were problems related to inter-staff relationships, which were difficult if not impossible for teachers to deal with directly; these required intervention from management which did not always happen.

8.2.3 *Is there a relationship between career development and workload stress?*

The McCrone Agreement introduced the Standard for Chartered Teacher, a scheme intended to "reward" teachers who wished to remain as a classroom teacher rather than seek promotion to a managerial post. The study found that very few teachers showed interest in the SCT, a fact that has subsequently been found generally throughout Scotland, evidenced by the small numbers of teachers embarking on the programme. The scheme has since been rescinded. There were two main barriers found that may explain the lack of interest: (1) the financial outlay and perhaps of more significance (2) teachers felt that CT did not hold the same status as a promoted post. In addition the study found that for some teachers, a third barrier was workload, in as much as they expressed feelings of stress from the workload they had at that time, and did not wish to add to this burden. So in this respect workload was a factor which prevented teachers enrolling in the CT scheme. The study found no evidence of workload stress linked to seeking a post in management. One respondent reported that he could move into management without the study involved in CT.

The McCrone Agreement introduced a mandatory 35 hours per year of CPD for teachers. In July, 2006, Douglas Osler, the former chief inspector of schools in Scotland, voiced concerns about the type of CPD which teachers undertake. His unease concerned the lack of any requirement to gain further qualifications or undergo assessment. He claimed that "*It was possible for a teacher in Scotland to qualify at age 22 and to be little more than a passive observer at required in-service training for the next 40 years*" (Nutt, 2006). Osler believed that CPD was so crucial

to raising standards and keeping teachers conversant with current changes in education that continued registration as a teacher with the GTCS should be dependent on satisfactory progress through CPD. To achieve this, he proposed that teachers be faced with a professional "MoT" every three years. This concept was approved by the chairperson of Parents in Partnership who supported the view that teachers should have to keep abreast of new developments and acquire new skills (Nutt, 2006).

The study found that all teachers spent 35 hours per year on CPD and that indeed many spent much more time than this. In addition, the type of CPD reported revealed that the teachers are attempting to keep up with new developments and skills. For the majority of teachers, CPD was related to professional reading and curriculum development linked to national and local policy initiatives, and teachers also undertook a wide range of developmental skills training in ICT. The majority (81%) reported feeling stressed by CPD; about 15% reported stress at level 4. Few teachers had taken award bearing courses, arguably because they already felt under pressure from workload and did not wish to add to it. Personality and coping strategies come into play when decisions regarding CPD and career development are being made. This statement is supported by the finding that the six teachers who were studying for a higher degree, generally reported a low mean stress score, despite arguably, committing much more time to CPD. The variables, for which they did report stress, were similar to those reported by the sample overall, but at a lesser stress level. However, like the teachers from the two learning communities there appeared to be a negative attitude to the statements linked to new policy, in particular

that they were not convinced that attainment had risen.   I conclude from these findings that there is a relationship between career development and workload stress in as much as workload prevents some teachers from seeking to advance their professionalism through undertaking further advanced study.

8.2.4 *What are your early impressions of CfE and how has it impacted on your teaching?*

The responses from this question brought a lighter, more positive note to teachers' work. If a lack of control was a major concern for teachers in the main study, this subsidiary piece of research found that CfE offered teachers more scope for personal choice in the curriculum. Many teachers in the study had reported stress from using the E.S. topics provided by the authority. A major finding now, was how encouraged teachers felt at being able to use their professional knowledge and skills to plan interdisciplinary work, which gave them more control over what and how they taught, and allowed them to "*create experiences relevant and motivational for pupils*" (Kenneth, Appendix 15b). If this is a true reflection of teachers' practice, it is an example of how CfE may help combat the lack of interest shown by pupils, which was a major issue reported in the main study. In addition, the CfE responses revealed that personal learning plans were being used in some schools, which is also a way to encourage pupils to be more involved in their own education. The responses revealed the way in which some teachers were attempting to redress the disadvantages of the geographical environment by creating a sense of community through working within and across stages in the school, and by involving pupils in wider society through working with outside agencies.

However, the results from this additional question also revealed that teachers still had issues with workload. While they enjoyed the freedom to plan topic work, it did generate additional workload for them. Planning "*new, engaging activities, consumes many hours*" (Lennon, Appendix 15b) in terms of resourcing additional materials. In addition, teachers reported having to duplicate their work, as some managers still demanded that forward plans maintain the same format as previously. The study found that additional planning was also needed for literacy and numeracy, and several teachers expressed concern that if each school was formatting individual planners, there would be a lack of consistency in standards and assessment across schools.

Some teachers also felt that the innovation was not sufficiently funded or resourced; a curriculum for a new millennium should have adequate resources for technology and ICT. Some schools had the minimum. The study revealed that some teachers felt that support had been provided for prior initiatives in secondary schools, such as Standard Grade and Higher Still, but there had been a lack of support with CfE. It further found that some teachers had issues with the provision and type of CPD, in that more useful activities could have been planned on INSET days and at collegiate meetings.

8.2.5 Finally, there is the overarching research question: "***What evidence is there from teachers of occupation stress in their work in relation to policy initiatives and change?***

The evidence provided by this study leads to the conclusion that teachers experienced occupational stress from a variety of sources. Issues related to workload were the most common sources, as the majority of teachers reported their work could not be completed in the 35 hour contractual week. Workload issues originated from both traditional factors in the job of teaching and from initiatives to implement policy changes, which may be adding to longer-standing workload issues. The policy on social inclusion, highlighted in the McCrone Agreement, was a major source of stress for the majority of teachers and was one reason given by several teachers who stated an intention to seek early retirement.

In addition, accountability, particularly via HMIE and establishment reviews were a major source of stress for teachers, including teachers who otherwise had a low mean stress score. The majority of teachers reported a negative attitude towards statements derived from new policy in terms of salary, lack of status, redeployment and lack of job security. In particular, the majority of teachers did not believe that being a skilled teacher led to promotion, and despite the changes put in place by the McCrone agreement, a majority still felt that promotional prospects were few and did not think attainment had risen following the initiatives.

The teachers' accounts, to some extent, revealed a sense of low self-esteem, which may be a reflection of this latter finding. Teachers suffered from a lack of control

over their working life and some felt that management may have provided more support in mediating this effect. Interestingly, senior management also appeared to suffer from a lack of control. One may have assumed they had a high level of decision latitude, but some reported a high level of stress from constraints of the local authority, suggesting they may have more authority than actual power. A further interesting finding was that those teachers who were seeking career advancement mainly chose the route to management rather than CT. The majority indicated there was more status attached to the role of management than CT.

The study showed that teachers were fulfilling their obligation of 35 hours per year CPD activities. Many teachers were spending many more hours than this, and the majority felt stress from CPD, indicating a relationship between career development and workload stress. Personal characteristics and coping strategies have a role in mitigating levels of stress, as those teachers who were studying for a higher degree and spending more hours on CPD than the sample in general, had relatively low levels of stress overall, although they did show a negative attitude towards policy change statements.

A last word is that early reports from CfE revealed many positive aspects. In relation to stress mediation, an important point was that teachers were enthused by their increase in autonomy over the curriculum. Teachers were using strategies to encourage involvement of pupils in their own education, a factor which may prevent teachers from dealing with pupils who do not value education – a stressor reported in

the original study. This additional piece of research found that workload was still an issue for teachers, as was a lack of support and resources.

8.3   Contribution to the field

This study brings a better understanding of the sources of occupational stress, which affects teachers' working conditions and health. The study has made a modest contribution to the paucity of research on occupational stress in Scottish schools; and is timely in reporting conditions shortly after the implementation of major policy change introduced by the Scottish Parliament in 2000. The study confirmed that features associated with workload and time pressures were derived from both factors intrinsic to teaching and from new policies and they were the major source of stress for the majority of teachers. The additional research in the study is important as it reveals that workload remains an issue in CfE due to the need for additional planning and providing new materials to support lessons. Although some of the findings are not new, they confirm those from previous research and they raise the question of why after a period of more than twenty years (since Margaret Johnstone's initial research) is workload stress still a major problem in Scottish teaching and what has been done to redress it?

The study revealed that workload was not the only factor which produced high mean stress scores. The policy on inclusion was a major contributor to stress, as was teaching pupils who appear disinterested in education. I would argue that the geographical location of some of the schools in the study, in conjunction with accountability resulting from the "raising standards" culture, and the cost-cutting

measure of closing special schools contribute to these findings.   While we, as teachers, acknowledge the social benefits to children and young people from being more accepted by their peers and adults, and the social benefits to children who come to a better understanding and acceptance of people with special needs, it may be argued that the majority of teachers in mainstream education have not received adequate training in how to support children with severe emotional / social behavioural difficulties, which may induce feelings of inadequacy in teachers. Headteachers and teachers also felt that despite their efforts to implement the new policies, pupil attainment had not risen. Teachers in Scottish schools do not generally receive additional pay for working longer hours, nor does extra work necessarily lead to promotion. There is a moral imperative in teaching to provide the best educational opportunities for pupils. If teachers feel their efforts are not fruitful, low self - esteem coupled with issues related to salary, lack of status and job security are predictors of adverse health outcomes and teacher retention related to stress. The demonstrable failure of the SCT introduces once more the problem of how to recognise the skills of effective experienced teachers.

Teachers were unhappy at the lack of control in their working life. There is some evidence that this problem may be addressed by the flexibility and autonomy provided by CfE; although this too has created issues linked to consensus over standards and assessment. There was also evidence that some teachers were adopting strategies which may encourage pupils to take more interest in their education.

8.4   Limitation of the study

The study was contained to schools within two learning communities in an inner city location with associated health and social problems. Before the study began, the local authority placed restrictions on access to the schools, leaving the final decision to headteachers of individual establishments. This may have prevented several schools from participating and the sample size was relatively small, a fact which prevented comparisons to be made between subsamples as numbers were too small to be significant. Those who took part in the study were volunteers, and my position as a teacher in one of the schools may have influenced their decision to participate. Therefore, there may be limitations on the generalisability of the findings. Research undertaken in more affluent areas of the city, or with a larger sample size may have provided different results, as pressures in schools in alternative geographical locations may differ. The final stage of the study consisted of one open question, which asked respondents for their initial impressions of CfE. The response to this request was extremely low (seven) although it did provide some interesting material for consideration.

8.5   Potential for further research

A larger scale study across different schools in Scotland would be required to confirm some of the findings in this study and to look at them in greater detail. Furthermore, the introduction of CfE would provide an opportunity to conduct a before and after study that could act as a benchmark for future work in this area. Personality or behaviour type could also be studied to further understand the role of such factors on the ability of teachers to withstand pressure.

8.6   The research methods

The weakness of the research method is acknowledged in terms of its reliance almost exclusively on a self- report questionnaire, unsupported by medical tests or observational evidence. This method has its limitations (Guglielmi and Tatrow, 1998; Wilson, 2002). Criticism is aimed at research into teacher stress due to a lack of progression in conceptual and methodological rigour and sophistication that has advanced research on occupational stress in general (Guglielmi and Tatrow. *ibid*). Numerous specific factors within the teacher's work environment can be objectively stressful, or perceived as such by the individual. In this respect, if a stressor is whatever one perceives as stressful, and these factors change from one individual to the other, self report may be the only method that allows access to such a subjective experience. One solution may be to add objective indices to the subjective assessment of stress. For example, independent assessment of class size, teaching load and financial resources available could be taken as non-reactive and unobtrusive measures of teacher stress in addition to subjective ones. Bringing together both indices would provide valuable information about the validity of the assessment and independent objective stress indicators could be effectively used in the prediction equation to make a statistical adjustment for the measurement bias associated with self-report instruments. However, such methods were not available within the scope of this research. By using group interviews to corroborate the findings from the study, and the addition of evidence gathered at a later stage, I have tried to make the study as rigorous as possible.

8.7 Recommendations

Based on the findings of the present study, the main recommendation is that the government make a serious attempt to evaluate the level of teacher stress in Scottish schools. If the evidence from the study is accurate, many teachers face the possibility of suffering serious health problems associated with unrelieved exposure to long term stressful situations; in addition there are implications for staff retention and recruitment to the profession – for which the McCrone Agreement had supposedly found a solution. There is a clear need to establish environmental and intrinsic job factors that contribute to occupational stress and put in place effective interventions to combat a negative working environment and make the profession as stress-free as possible. In relation to workload, the findings from the study are supported in a very recent report by the Organisation for Economic Cooperation and Development (OECD, 2012) which found that teachers in Scottish schools spent around 150 more hours in class than teachers from many other countries. There were suggestions in the week that this report was published that teachers' holidays should be extended to allow more time for recovery from a heavy workload, but this would not address the cause of the stress; and may in fact exacerbate the workload as there may be more time pressure on staff to complete tasks in a shorter period.

A second issue which needs to be addressed by the Government is the question of rewarding teachers who remain in the classroom. This problem has persisted for some time, for example, a post of "senior teacher" was introduced in the 1980s to reward experienced teachers who wished to remain in class through an increase in salary and some additional responsibility. Within a very short period of time the post

had been "hijacked" by ambitious teachers who had very little experience, but who wanted promotion and performed well at interviews. The post soon became the first stepping stone on the route to a career in management. One has to wonder why this was allowed to happen, not just by the local authority, but by the teaching unions. The McCrone Agreement introduced the post of CT and ten years later this post has been rescinded. The McCormac Report (2011) stated that the "*widely held view*" was that the existing cohort did not represent the best teachers in Scotland, and that "*some of our very best teachers for a variety of reasons have not embarked on the route*". Several reasons for lack of interest are suggested in this study, not least because of the cost and the workload, but also because there is more status attached to a promoted post. This appears like a terrible insult aimed at teachers who gained the award through maintaining a high level of CPD throughout their career or who have engaged in many hours of award bearing courses which they have personally financed. It also appears that CTs are being held accountable for a lack of improved outcomes for children and young people. The rescinding of SCT could engender further lack of confidence in policy makers, as it could be seen again as an example of policy being introduced where the practicalities of the policy have not been thoroughly thought through.

A third problem that remains to be solved is of raising standards. Much education policy has been unsuccessful in improving student outcomes or in reducing the inequities in those outcomes as is evidenced in HMIE reports which continue to state that pupils who live in socially and economically disadvantaged areas are among the lowest 20% of achievers. Improving results across large education systems in a

reasonably short period of time is very hard to achieve (Levin, 2010). As in the UK, many countries have implemented ambitious improvement plans which have not been successful in accomplishing what they set out to do (Levin and Fullan 2008; OECD 2009). There are several reasons why this is so: first, problems in education reflect the larger problems and inequalities which exist in societies and which schools cannot overcome. Second, many improvement projects are poorly implemented, which is reflected in this study through criticism of lack of resources and the pace of change. The common means currently used to generate improvement have most often been based on structural aspects of the system – governance, finance, workforce, and accountability, most of which can be changed fairly easily, at least on paper, through policy edicts.

These changes are rooted in market- oriented systems such as managerialism, choice, markets, and incentives. There is considerable empirical evidence now which shows a lack of sustained improvement in outcomes resulting from these strategies. Levin (*ibid.*) suggests the way forward for improvement in educational outcomes is to learn from the evidence of research when formulating policy. Priestley and Humes (2010) agree with Levin of the importance of looking to theory when gauging the potential success of CfE. Levin claims that theoretical insights provided by available literature on curriculum have been ignored and as a result the curriculum is problematic. These feelings are mirrored by Lindsay Paterson, Professor of Education at Edinburgh University who claims CfE is in trouble as there has not been clear leadership and focus in the implementation of CfE (Sunday Times, September, 2012).

8.8   Personal Reflection

At times the journey through this study has seemed like a long and winding road- due to work commitments, personal ill-health and the retirement of two supervisors. Having submitted inappropriately in 2010, I appreciate the opportunity given to me to take time to re-evaluate my previous work and complete the study to a higher standard. During this extra period I have gained not only a deeper understanding of the research process, but I have also gained more insight and knowledge of how policy processes impact on your life. I have been privileged and felt humbled by the way teachers have trusted me and allowed me in to their thoughts and feelings and I hope this thesis does justice to the teachers who volunteered to participate in the study.

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Appendices

Index of Figures

Index of Tables

Appendix 2

Dear colleague,

As a teacher working in a school in ……….I am studying for a higher degree in education.

Part of my research is an investigation of the impact of the National Priorities and local authority initiatives on teachers in two Learning Communities.

I am gathering information for my study through a questionnaire, enclosed, which I ask you to take time to complete.

I assure you that any information given will be completely confidential and that no individual or establishment will be identified. The questionnaire should take about 20 – 25 minutes to complete.

Thank you for your co-operation and assistance. Could you please return the questionnaire by Monday 27th June, a stamped addressed envelope is enclosed for its return. I realise this is a very busy time for everyone, but I need the questionnaires to be returned or I shall have nothing to write about.

I am also looking for volunteers to keep a diary of the work they undertake during one week. If you would be interested in volunteering to complete the diary, please contact me at the address given on the envelope, or email me at cat.morrison@btinternet.com .

Thank you.

Yours sincerely

Catherine Morrison

Impact of National and Local Authority Priorities on Teachers

Section 1: Background Information   **Please tick the appropriate boxes**

1.1   What post do you currently hold in your school?

Class teacher   ☐

Principal teacher   ☐

Deputy Headteacher   ☐

Headteacher   ☐

Other (please state):_____

1.2   Gender   male   ☐   female ☐

1.3   For how many years have you been teaching?

                                              0 – 5   ☐

                                              6 – 10   ☐

                                              11 – 15   ☐

                                              16 – 20   ☐
                               more than 20 years   ☐

1.4   How many years have you been in your current post?

                                              _____ Years

1. 5   Into which age range do you fall?

20 – 29	☐
30 – 39	☐
40 – 49	☐
50 – 59	☐
60 +	☐

1.6   Is your post:

Full time permanent ☐

Job share permanent ☐

Full time supply   ☐

Job share supply   ☐

Probationer   ☐

Other – please specify _____

1.7   For which stage in school are you currently responsible? _____

1. 8   Do you hope to pursue a managerial post in your career?   Yes ☐   No ☐

1.9   **or/** Do you hope to follow the route for chartered teacher status? Yes ☐ No ☐

1. 10   If you have answered yes to either question **1.8** or **1.9** please comment on why

you have chosen that route?

_____

_____

_____

1.11	If you have answered no to both questions comment on why you are not

considering either option?

_____
_____
_____
_____

1.12	**I**f you are in the appropriate age group, do you plan to take early retirement?

Yes ☐	No ☐

1.13	If the answer is yes, please comment further below, stating why you have made this decision:

_____
_____
_____

Please answer sections 2 – 7. On a scale of 1 to 4, (1 = no stress; 4 = great stress) how do you rate the following items as sources of stress in your current post?

Section 2 Pupil – teacher interaction   **Please circle as appropriate**

2.1   Verbal aggression from pupils   1 2 3 4

2.2   Confrontations with pupils in class   1 2 3 4

2.3   Pupils answering back   1 2 3 4

2.4   Maintaining discipline   1 2 3 4

2.5   Pupils challenging your judgement / management   1   2 3 4

2.6   Dealing with basic pupil behavioural problems   1 2 3 4

2.7   **D**ealing with pupils who do not seem to value education   1 2 3 4

2.8   Witnessing increasing aggression between pupils   1 2 3 4

2.9   Lack of parental back-up on matters of discipline   1 2 3 4

2.10 Physical aggression from pupils   1 2 3 4

2.11 Keeping the whole class fully engaged and interested   1 2 3 4

2.12 Lack of management support in discipline matters   1 2 3 4

Section 3   Management / structure of the school

3.1 The hierarchical nature in the school   1 2 3 4

3.2 Lack of participation among staff in decision-making   1 2 3 4

3.3 Conflict between the needs of the class and
the views of senior management   1 2 3 4

3.4 Lack of support from head teacher   1 2 3 4

3.5 Individual staff deviating from agreed school policy   1 2 3 4

3.6 Poor staff communication   1 2 3 4

3. 7 Coping with colleagues who are not fulfilling
their responsibilities   **1   2   3   4**

3.8 Too little responsibility within the school   **1   2   3   4**

3.9 Too much responsibility for curriculum development   **1   2   3   4**

3.10 Professional rivalry among staff   **1   2   3   4**

3.11 Too few opportunities to make my own decisions   **1   2   3   4**

3.12 Staff conflict over shared responsibility for preparing
reports for parents   **1   2   3   4**

Section 4 School environment

4.1 Having to teach in cramped classrooms   **1   2   3   4**

4.2 Poor staff / pupil ratios   **1   2   3   4**

4.3 Class size   **1   2   3   4**

4.4 The poor physical condition of the work environment   **1   2   3   4**

Section 5 Changes taking place within education

5.1 Constant changes taking place within the profession   **1   2   3   4**

5.2 The move towards a centralised / national curriculum   **1   2   3   4**

5.3 The lack of information as to how changes are to be
implemented   **1   2   3   4**

5.4 Addressing policy on inclusion   **1   2   3   4**

5.5 Modifying teaching strategies to raise attainment   **1   2   3   4**

5.6 The E. S topics recommended by the Local Authority   **1   2   3   4**

Section 6 Appraisal of teachers

6.1 **D**emands from parents for good results   **1 2 3 4**

6.2 Monitoring by the headteacher of performance in class **1 2 3 4**

6.3 Having teaching appraised by other teachers   **1 2 3 4**

6.4 **A**ttending parents' evenings   **1 2 3 4**

6.5 Inspection by HMIE   **1 2 3 4**

6.6 Undergoing an establishment review   **1 2 3 4**

6.7 Academic pressure from within the school   **1 2 3 4**

6.8   Yearly staff review   **1 2 3 4**

6.9   Process of annual school evaluation   **1 2 3 4**

6.10 Having to achieve targets for National Test results **1 2 3 4**

6.11 Having to produce evidence of what has been taught
     and assessed   **1 2 3   4**

6.12 The paperwork associated with assessment   **1 2 3 4**

6.13   Feeling the need to be accountable   **1 2 3 4**

6.14   Having to comply with senior school management   **1 2 3 4**

6.15   Feeling the need to continuously maintain
      a high standard   **1 2 3 4**

6.16   The need to modify teaching strategies to raise
      attainment   **1 2 3 4**

6.17   The way data from National Tests are published   **1 2 3 4**

Section 7   The concerns of management (applicable only for school
management team. If you are not a member of the management team, please ignore
and go to section 8)

7.1   Staff do not understand the pressures a manager
  must sustain   **1   2   3   4**

7.2   Others have unrealistically high expectations of the role   **1   2   3   4**

7.3   The extent of supervisory activities performed for the school   **1   2   3   4**

7.4   The demands of the Local Authority   **1   2   3   4**

7.5   Constraints of the Local Authority   **1   2   3   4**

Thank you for your co-operation so far.
I would be grateful if you would continue and complete the survey.

The following issues are a concern for teachers under pressure. Please indicate to what extent you feel pressure; (1 = no pressure; 4 = great pressure)

Section 8   Workload

8.1	Time pressure	1	2	3	4
8.2	Long hours	1	2	3	4
8.3	Too much work	1	2	3	4
8.4	Time management	1	2	3	4
8.5	Private life interferences	1	2	3	4
8.6	Administration tasks	1	2	3	4
8.7	Paperwork	1	2	3	4
8.7	Assessment	1	2	3	4
8.8	Assemblies / school shows	1	2	3	4
8.9	Participation in working parties	1	2	3	4
8.10	Deadlines for forward plans,	1	2	3	4
8.11	Deadlines for standardised tests,	1	2	3	4
8.12	Deadlines for development work	1	2	3	4
8.13	Continuing professional development	1	2	3	4
8.14	Pace of work to improve attainment	1	2	3	4
8.15	Extra workload related to development plan	1	2	3	4

Please indicate to what extent you agree/disagree with the following statements by ticking the appropriate box.

Section 9   Status / promotion opportunities

		Strongly agree	Agree	Disagree	Strongly disagree
9.1	Being a good teacher does not necessarily lead to promotion				
9.2	There are too few opportunities for promotion				
9.3	Society has a diminishing respect for the teaching profession				
9.4	Teachers' salaries are out of proportion to workload				
9.5	Achieving the standard for Chartered Teacher will involve a great deal of academic work				
9.6	The Standard for Chartered Teacher requires an unreasonable personal financial investment				
9.1	The threat of redeployment is a concern for teachers				
9.2	Lack of job security within the profession has increased				

Section 10   Ambiguity of the teacher's role

		Strongly agree	Agree	Disagree	Strongly disagree
10.1	There is uncertainty about the degree or area of a teacher's responsibility				
10.2	Schemes of work are poorly defined				
10.3	There is now more unfamiliarity with the demands faced by teachers				
10.4	Ongoing training for new curricula is not adequate				
10.6	Ongoing training for new teaching strategies is not adequate				
10.7	The number of pupils experiencing social problems is increasing				
10.8	The range of social problems experienced by pupils is increasing				

Section 11 Relating to National Priorities and Local Authority Initiatives

		Strongly agree	Agree	Disagree	Strongly disagree
11.1	The National Priorities ensure that every young person fulfils their potential at school				
11.2	Formative assessment can be a powerful tool for improving learning				
11.3	Formative assessment is the most effective approach to raising attainment				
11.4	Work requirements can be completed in the contracted 35 hour week				
11.5	Getting 1½ hours reduced class contact time each week is always possible				
11.6	Pupil attainment has been raised since the introduction of the National Priorities				
11.7	New areas for development or new teaching strategies are constantly being introduced				
11.8	The Learning Community has introduced a large number of teaching and learning initiatives over the last four years				
11.9	There has been adequate training to implement these initiatives effectively				
11.10	Teachers feel confident in teaching the new initiatives				
11.11	Teachers have received adequate training to teach the new initiatives well				
11.12	Pupil attainment has risen in this time				
11.13	I am a more effective teacher due to implementing new teaching / learning strategies				
11.13	I am working harder and pupils are achieving more				
11.14	I am working harder, but there is little evidence that pupils are achieving more				
11.15	I feel fairly well satisfied with my job				
11.16	I really enjoy my work				
11.17	Most days I feel enthusiastic about the job				
11.18	Much of the time I have to force myself to go to work				
11.19	I frequently think about finding another job or taking early retirement				

Please make a list of all CPD activities you undertake.

Do you spend more than 35 hours per year on CPD?　　　　　**Yes** ☐　**No** ☐

If yes, how many hours altogether?

What CPD activities do you undertake out with the 35 compulsory hours?

Do you normally leave school to carry out your non-contact time?　Yes ☐　**No** ☐

Thank you very much for taking the time to complete the questionnaire.

I have tried to make this questionnaire as comprehensive as possible, but there may be other aspects on which you would like to comment. Please add these, using an extra page if necessary.

Appendix 3   Letter to head teachers

Xxxxxx
Xxxx
xxxxx
email: cat.morrison@btinternet.com

6 June 2005

Dear Ms xxxxxxx

I am a teacher in a primary school in xxxxx, currently studying for a Doctor of Education Degree at xxxxxxx University.

My area of study is concerned with National Priorities and Local Authority initiatives. To complete my study, I would like to administer a questionnaire to the teaching staff in the feeder primary schools connected to xxxx and xxxx Learning Communities. I have been given permission by the Director of Education to undertake this with the approval of the head teachers.

The purpose of this email is to ask if you would allow me to include your school in my study. I assure you that any information given will be completely confidential and that no individual or establishment will be identified.

Please let me know if this is acceptable and if you require any further information, please do not hesitate to contact me at the above address.

If you do allow me to administer my questionnaire, could you please indicate how many teaching staff are employed at your school, including management.

Yours sincerely

Catherine Morrison

Attachment: Permission letter from xxxxxxx Education Department. When you open the attachment the writing will be very small as I scanned the letter into the computer. If you click on 100% you will be able to enlarge the text.

Appendix 4   pre-study conception of stress

Gender	occupation	Age range	Stress is …	Measures to relieve stress
1. male	I.T.	31 - 40	Physical and mental symptoms of unresolved problems	Exercise, relaxation, lots of red wine ☺
2. male	operations director	31 - 40	A regular feeling which is a result of over work, personal problems and todays financially focussed lifestyle	Friends and fun, talking loads to people about whats Causing stress. Sometimes alcohol!
3. male	doctor	31 - 40	Lying in bed unable to sleep thinking about problems needing sorted	Go for a run or drink a bottle of wine or two
4. female	Housewife / mum	31 – 40	Trying to organise the many activities of t he day - as is now normal for todellers!	Keep a diary – think about the next day in the evening and try to plan wisely
5. female	Registered nurse	41 – 50	A frightening and worrying experience, causing concern for health	I work out what is causing the stress and then look for a solution
6. female	Social worker	Over 51	Feeling anxious, and unable to concentrate. This leads to headaches and neck pain. And poor sleep pattern. Struggle to do basic tasks	Take some timeout, speak to colleague or line manager. Try to prioritise work load. Try to relax at home by listening to music
7. male	Delivery driver	Over 51	Doing far too much too often, not having enough quality time for yourself, not knowing when to say no.	Try slowing down, go to the gym, also get enough sleep, drink less alcohol

Appendix 5   **Responses that will generate contemporary questions**

Dear colleagues, I am carrying out a study into the impact of the National priorities on teachers in a Learning Community in the city. I shall be gathering data for the study through a questionnaire. Literature gives some indication of the pressures that teachers face in their work environment. The purpose of this short questionnaire which I am asking you to complete is to obtain more up to date information on the potential pressures which are currently felt by teachers in the xxxx area. Any information you give will be strictly anonymous and confidential and will not be used directly in the study itself, but will assist me in formulating a larger questionnaire which I shall administer to the schools in the learning Community being studied. Thank you very much for your time. A stamped addressed envelope is provided for the return of the questionnaire.

Catherine Morrison

Tick the appropriate answer.

1. What post do you currently hold in your school?

Class teacher

Principal teacher

Depute head

Headteacher

Other – please specify

2. Gender: male   female

3. How many years have you been teaching?

4. How many years in your current post?

5. Into which age range do you fall?

                    20 – 29
                    30 – 39
                    40 – 49
                    50 – 59
                    60 and over

6. Are you

          Full time permanent

          Job share permanent

          Full time supply

          Job share supply

          Probationer

          Other – please specify

7. Which stage in school do you currently teach?

8. what is the percentage FME of your school?

9. What aspects of your job put you under most pressure?

10. List 2 or 3 aspects which you find most demanding.

Responses

Respondent 1.
    Question 9 Having to teach subjects like music, art, drama etc to a much higher degree of excellence. I am not an expert in all subjects.

Assessing musical attributes of children e.g. is a nightmare if you are tone deaf.

Question 10 Lack of time to fit in all aspects of the curriculum.
Policy of inclusion where a class of 33 is not unusual.

Respondent 2 (working with chn with complex needs)
Q 9   new types of recording, often not for a good purpose. Being a constant diplomat in the Ed team.

Q 10 working in team where staff are difficult. Stress then of delivering the education
Children with profound educational problems – finding time to deliver education to ensure progress
Often physically

Respondent 3 (also special educational needs sector)
Q 9 co-ordinating class team (teacher, instructor and auxiliary); recording lessons and / or incidents of verbal abuse, violent and aggressive behaviour e.g. biting, kicking, scratching

Q 10 dealing with challenging behaviour;
Protecting children from peer violence; involving team with targets and decisions

Respondent 4
Q 9   paperwork, discipline issues, workload, interruptions

Q 10 challenging behaviour, many tasks – not enough time to do them all

Respondent 5
Q9 workload – things getting on top of me, can't cope; assessment;
Discipline –unable to change their behaviour

Q 10 school's too hot, can't open windows

Respondent 6

Q 9 trying to ensure that each child in class receives the best education I can give them

Q 10 forward/ daily planning of lessons for 4 / 5 groups; lack of interest of some pupils; low key continuous misbehaviour; state of the classroom – paint falling off walls, leaking roof, very depressing

Respondent 7

Q 9 workload - ever expanding curriculum

Paper work; additional responsibilities e.g. PGCE, maths working parties, delivering inset.....

Q 10 lack of resources

Respondent 8

Q 9 discipline – lack of support

Paperwork – assessments; forward planning

Q 10 expectations too high

Respondent 9 parental; broad curriculum; time for effective communication

Respondent 10 record keeping; marking pupils' work

Respondent 11 communication from within the school; lack of information –
Managing the curriculum – the width – within timescales

Respondent 12 paperwork; indiscipline

Respondent 13 workload; planning; discipline procedures

Respondent 14 corrections; workload

Appendix 5 stage 2 of analysis   Themes

Curriculum	Role of the teacher	Assessment/ accountability
Workload – ever expanding curriculum Broad curriculum Managing the curriculum – the width – within timescales	Having to teach subjects like music, art, drama etc to a much higher standard Assessing musical attributes of children is a nightmare if you are tone deaf I am not an expert in all subjects Being a constant diplomat in the team Co-ordinating class team – teacher, instructor, classroom assistant Involving team with targets and decisions Additional responsibilities e.g. PGCE – maths working parties, delivering inset	Finding time to deliver education to ensure progress Involving team with targets and decisions Assessment Trying to ensure that each child in class receives the best education I can give them Expectations too high
Paperwork	**Time pressure**	**School environment**
New types of recording, often not for a good purpose Recording lessons and/ or incidents of verbal abuse Paperwork Many tasks – not enough time to do them all Paperwork **111** Paperwork- assessments, forward planning	Lack of time to fit in all aspects of the curriculum Finding time to deliver education to ensure progress Time for effective communication	Where a class of 33 is not unusual School's too hot, can't open windows State of the classroom – paint falling off walls, leaking roof, very depressing Lack of resources
	Interpersonal relationships	**Lack of control**
	Working in a team where staff are difficult Involving team with targets and decisions Parental Communication from within the school, people turning up	Interruptions Discipline – unable to change their behaviour Can't cope

Inclusion / behaviour		Workload
Inclusion / behaviour Policy on inclusion Children with profound educational problems Violent and aggressive behaviour Dealing with challenging behaviour Protecting children from peer violence Discipline issues Challenging behaviour Discipline – unable to change their behaviour Lack of interest of some pupils Low key continuous misbehaviour Discipline – lack of support Indiscipline Discipline procedures		**Workload** Workload **1111** Many tasks – not enough time to do them all Workload – things getting on top of me Forward/ daily planning of lessons for 4/5 groups Workload – ever expanding curriculum Record keeping, marking pupils' work Planning Corrections

Appendix 6   The top 10 sources of stress as reported by teachers in Travers and Cooper (1993)

Sources of pressure	Mean	SD	percentage scoring 5 or 6
Lack of support from the government	5.9	1.11	85.1
The constant changes taking place within the profession	5.30	1.05	84.0
The lack of information on how the changes are to be made	5.30	1.05	83.6
Society's diminishing respect for my profession	5.19	1.13	80.8
The move towards a national curriculum	4.89	1.26	71.3
A salary that is out of proportion to workload	4.88	1.29	68.3
Having to produce assessment of pupils	4.79	1.20	67.8
Dealing with basic behavioural problems	4.78	1.36	69.2
Lack of non-contact time	4.77	1.34	66.8
Being a good teacher does not necessarily mean promotion	4.76	1.37	65.3

Appendix 7 Group interview responses for analysis

Adele

1. stress is feeling overburdened with tasks to complete, **NATURE** worrying about the demands which are put on you, worrying about delivering the curriculum properly. **OUTCOME**

2. Yes. - (1) new areas of the curriculum which take time to teach as there is a lot of reading to be done before hand, i.e. ICT, religious & moral education, environmental studies, technology. **CAUSE** This must be done in order to feel confident about your teaching and produce quality work. (2) Discipline issues bring about stress too **CAUSE** as you become frustrated at not being able to teach properly without constant interruptions from disturbed children who in turn upset the rest of the class. **CAUSE**

3. Measures

Try deep breathing! **handling** Walk at night for 30 minutes.
Handling
Try to be as organised as I can be so that the class runs smoothly. **handling** Stop feeling guilty about <u>not</u> covering everything <u>all</u> of the time. (Adele's underlining). **Handling**
Have most disturbed children removed from the class to work on a one-to-one with the classroom assistant so that rest of children remain calm. **handling**

Betty

1. Stress is pressure - on mental and / or physical energy and the anxiety / exhaustion caused by this. **Nature/ outcome**

2. Yes there is a great deal of pressure about areas of the curriculum, preparing children to receive sacraments, absences, time keeping, **CAUSE** worry, in some cases, about home life of children.**outcome** How to help children with special needs, physical welfare of children and how to build on mental capabilities, how to deal with social / behavioural issues, anger management, development of caring attitudes **CAUSE**

3. <u>Measures</u>

Relaxing activities in my own time include crosswords, reading and television. **handling** In class various calming activities (for children) are very helpful.   Talking and listening sessions are beneficial as is circle time. Story telling or audio tapes are also good. **Handling** activities

Carol

1. Stress is something that just creeps up on you **nature** and leaves you bad tempered and depressed. **Outcome**

2. I find dealing with difficult parents a stressful aspect of the job. **CAUSE** Also when reviewing a previous terms work, I feel stressed when I revised areas of the curriculum that I haven't taught well – i.e. I.T. **CAUSE**

3. <u>Measures</u>

I try not to be in school any later than 4.15 pm, even if it means I take things home with me. **Handling**   The work I do take home is stuff that doesn't need a lot of focus / concentration to do.**HANDLING** I try not to do any school work on my non-teaching days, I will only start to look over things on a Sunday night but **<u>never</u>** on a Saturday. **Handling**

Debbie

1. Stress is a feeling of overload, **nature** anxiety when I am not in control of what I have to do **nature /outcome**

2. Workload issues cause most stress. **CAUSE** Tasks / meeting etc arranged with insufficient notice. **CAUSE**

3. Measures

Go to the gym. Talk over/ discuss/ air ! issues causing concern.
 Handling

Evelyn

1. Stress is a feeling that things are getting on top of you **outcome**; of feeling that you can't cope and are not doing work well. **Nature**

2. Stressful experiences are related to discipline – when pupils are badly behaved and they do not respond to reprimands, **CAUSE** I lose my temper and apart from sending them to the HT or excluding them from class, I feel inadequate and unable to stop them answering back. **outcome**

3. Measures

I run. Also talk about what has happened, in the staffroom.
Handling

Frances

1. Stress is having your given teaching interrupted to cover classes during teacher absence. **CAUSE**

2. When staff do not follow what we have agreed as policy, but go off and do their own thing especially when it's a matter of discipline. **CAUSE**

Some staff don't pull their weight and get away with it **CAUSE**– e. g. sharing responsibility in working parties and report writing. I seem to do all that is asked of me while some others do nothing.

The policy on inclusion **CAUSE** – pupils who at one time would have been in special school – time spent planning for and teaching individual children out of proportion to that allotted to other pupils. **CAUSE**

3. No answer

Grace

1. Stress is more work not enough time. **CAUSE**
2. Yes. Relationships with children **cause** Inability to get job satisfaction because can't get kids to learn. **Cause** Not interested, no amount of cajoling , rewarding makes any difference
3. staffroom ethos letting off steam **handling**

Helen

1. Stress is insomnia, lack of concentration, over thinking things, depression, bad moods and anxiety. **Nature**

2. Stress is all around me at work. **nature** I have to meet deadlines, deal with difficult behaviour, plan lessons, assess and be accountable. **Cause** All of these things mentioned above are stressful in equal measure and the most stressful one can change daily depending on new pressures and expectations. **Nature**

3. I relieve stress by talking to my friends and partner, going to the gym or exercising and making time for relaxation or activities. **Handling**

Irene

1) Stress is lack of support when needed.   **NATURE**

Stress is a lack of communication that in turn makes you feel incompetentoutcome
Stress can be a motivator **Nature** if it's not a constant existence in your job. Unfortunately stress is in every job at some level. Within teaching there is a high level of stress with a high level of demand of your own personal time. **Cause / outcome**

2) Within my job there is a lot of stress. I experience it when communication between management and staff deteriorate. **cause** I also experience stress within my job to complete tasks within a timescale **cause**. Such as report cards, parents night, ASP'S. All of the mentioned are within my remit, however, I for example have 31 children, some of my colleagues have 18 children. Yet the allocation of time given is the same. I can find this stressful.
The most stressful part of my day can tend to be hometime. Getting children out the door with jackets. Ensuring they are leaving with a known adult. Parents can be very rude and talk down to you. I find this stressful and unacceptable. **Cause**

3)I go to the gym every day of my life. I take lots of combat classes :). I enjoy a long run. I find exercise and focusing on breathing and sometimes pain! Distracts my mind completely, it helps me to switch off. **handling**
Believe it or not. I am not a big drinker. I don't think alcohol would let me unwind.
I do partake in swearing :). That can be an instant relief. **Handling**

Appendix 8 group response question 1

Adele

1. stress is feeling overburdened with tasks to complete, worrying about the demands which are put on you, worrying about delivering the curriculum properly.

Betty

1. Stress is pressure - on mental and / or physical energy and the anxiety / exhaustion caused by this.

Carol

1. Stress is something that just creeps up on you and leaves you bad tempered and depressed.

Debbie

1. Stress is a feeling of overload, anxiety when I am not in control
      of what I have to do.

Evelyn

1. Stress is a feeling that things are getting on top of you; of feeling
      that you can't cope and are not doing work well.

Frances

4.   Stress is having your given teaching interrupted to cover classes
      during teacher absence.

Grace

4.   Stress is more work not enough time.

Helen

1. Stress is insomnia, lack of concentration, over thinking things, depression, bad moods and anxiety.

1) Stress is lack of support when needed.
Stress is a lack of communication that in turn makes you feel incompetent.
Stress can be a motivator if it's not a constant existence in your job. Unfortunately stress is in every job at some level. Within teaching there is a high level of stress with a high level of demand of your own personal time.

Appendix 9 - group interviews questions 2 and 3

 Adele

 2. Yes. - (1) new areas of the curriculum which take time to teach as there is a lot of reading to be done before hand, i.e. ICT, religious & moral education, environmental studies, technology. This must be done in order to feel confident about your teaching and produce quality work. (2) Discipline issues bring about stress too as you become frustrated at not being able to teach properly without constant interruptions from disturbed children who in turn upset the rest of the class.

Betty

 2. Yes there is a great deal of pressure about areas of the curriculum, preparing children to receive sacraments, absences, time keeping, worry, in some cases, about home life of children. How to help children with special needs, physical welfare of children and how to build on mental capabilities, how to deal with social / behavioural issues, anger management, development of caring attitudes

Carol

 2. I find dealing with difficult parents a stressful aspect of the job.
   Also when reviewing a previous terms work, I feel   stressed
   when I revised areas of the curriculum that I haven't taught
   well – i.e. I.T.

Debbie

 2. Workload issues cause most stress. Tasks / meeting etc arranged
   with insufficient notice.

Evelyn

2. Stressful experiences are related to discipline – when pupils are

   badly behaved and they do not respond to reprimands, I lose

   my temper and apart from sending them to the HT or

   excluding them from class, I feel inadequate and unable to

   stop them answering back.

Frances

5. When staff do not follow what we have agreed as policy, but go

   off and do their own thing especially when it's a matter of

   discipline.

Some staff don't pull their weight and get away with it – e. g.

sharing responsibility in working parties and report writing. I seem

to do all that is asked of me while some others do nothing.

The policy on inclusion – pupils who at one time would have been

in special school – time spent planning for and teaching individual

children out of proportion to that allotted to other pupils.

Grace

5. Yes. Relationships with children Inability to get job

   satisfaction because can't get kids to learn. Not interested, no

   amount of cajoling , rewarding makes any difference

Helen

2. Stress is all around me at work. I have to meet deadlines, deal with
difficult behaviour, plan lessons, assess and be accountable. All of
these things mentioned above are stressful in equal measure and the
most stressful one can change daily depending on new pressures and
expectations.

Irene

2) Within my job there is a lot of stress. I experience it when communication between management and staff deteriorate. I also experience stress within my job to complete tasks within a timescale. Such as report cards, parents night, ASP'S. All of the mentioned are within my remit, however, I for example have 31 children, some of my colleagues have 18 children. Yet the allocation of time given is the same. I can find this stressful.

The most stressful part of my day can tend to be hometime. Getting children out the door with jackets. Ensuring they are leaving with a known adult. Parents can be very rude and talk down to you. I find this stressful and unacceptable.

Question 3 what measures do you take to relieve stress?

Adele

3. Measures

Try deep breathing! Walk at night for 30 minutes.

Try to be as organised as I can be so that the class runs smoothly.

Stop feeling guilty about <u>not</u> covering everything <u>all</u> of the time.

(Adele's underlining).

Have most disturbed children removed from the class to work on a

one-to-one with the classroom assistant so that rest of children

remain calm.

Betty

3. Measures

Relaxing activities in my own time include crosswords, reading and

television. In class various calming activities (for children) are very

helpful.   Ttalking and listening sessions are beneficial as is circle

time. Story telling or audio tapes are also good.

Carol

<u>3. Measures</u>

I try not to be in school any later than 4.15 pm, even if it meant ti

       take things home with me. The work I do take home is stuff

       that doesn't need a lot of focus / concentration to do. I try

       not to do any school work on my non-teaching days, I will

       only start to look over things on a Sunday night but **<u>never</u>** on

       a Saturday.

Debbie

3.   Go to the gym. Talk over/ discuss/ air ! issues causing

       concern.

Evelyn

3.   I run. Also talk about what has happened, in the staffroom.

Frances – no answer

Grace

3   staffroom ethos letting off steam

Helen

3.   I relieve stress by talking to my friends and partner, going to
the gym or exercising and making time for relaxation or activities.

Irene

3)I go to the gym every day of my life. I take lots of combat classes :). I enjoy a long run.
I find exercise and focusing on breathing and sometimes pain! Distracts my mind
completely, it helps me to switch off.
Believe it or not. I am not a big drinker. I don't think alcohol would let
me unwind.
I do partake in swearing :). That can be an instant relief.

Appendix 10   Stage 2   Analysis categories for group interviews

Causes of stress	Outcomes of stress
Demands which are put upon you New areas of the curriculum which take time to teach There is a lot of reading to be done beforehand ICT, religious and moral education, environmental studies, technology Discipline issues bring about stress too Constant interruptions from disturbed children who in turn upset the rest of the class There is a great deal of pressure about areas of the curriculum, preparing children to receive the sacraments Absences, time keeping (of children) How to help children with special needs Physical welfare of children and how to build on mental capabilities How to deal with social/behavioural issues, anger management, development of caring attitudes (of children) I find dealing with parents a stressful aspect of the job Also when reviewing a previous terms work, I feel stressed when I revised areas of the curriculum that I haven't taught well – i.e. IT Workload issues cause most stress Tasks/ meetings etc arranged with insufficient notice Stressful experiences are related to discipline when pupils are badly behaved and they do not respond to reprimands Having your given teaching time interrupted to cover classes during teacher absence When staff do not follow what we have agreed as policy, but go off and do their own thing, especially when it is a matter of discipline Some staff don't pull their weight and get away with it – e.g. sharing	You become frustrated at not being able to teach properly Anxiety/ exhaustion Worrying about delivering the curriculum properly Worry, in some cases, about homelife of children Leaves you bad tempered and depressed Anxiety when I am not in control of what I have to do Feeling that you can't cope and are not doing well I lose my temper I feel inadequate and unable to stop them answering back Stress is insomnia, lack of concentration, over-thinking things, depression, bad moods and anxiety Feeling inadequate and unable to cope with workload, and manage behaviour of pupils Trying not to lose my temper and take my frustration out on the class Inability to get job satisfaction because can't get kids to learn. Not interested, no amount of cajoling, rewarding makes any difference

responsibility in working parties and report writing

I seem to do all that is asked of me while some others do nothing

The policy on inclusion – pupils who at one time would have been in special school – time spent planning for and teaching individual children out of proportion to that allotted to other pupils

Relationships with children

I have to meet deadlines, deal with difficult behaviour , plan lessons, assess and be accountable

Within my job there is a lot of stress. I experience it when communication between management and staff deteriorate

I experience stress within my job to complete tasks within a timescale such as report cards, parents' nights, ASPs (additional support plans). All of the mentioned are within my remit, however, for example, I have 31 children, some of my colleagues have 18 children, yet the allocation of time given is the same. I can find this stressful

The most stressful part of my day can tend to be home time. Getting children out the door with jackets. Ensuring they are leaving with a known adult. Parents can be very rude and talk down to you. I find this stressful and unacceptable

Coping with other staff members who are not doing their bit. In a school like mine, there are timetables for everything, people don't stick to it

Overloaded curriculum, knowing that I am not delivering all of it effectively

Trying to teach without disruption, trying to keep up with all the new additions to the curriculum. Time spent □learning´ it myself

There is no way to complete everything that has to be done in the time allocated, under a lot of pressure to complete. I made a decision to go part-time – to go without money – still take things home

You're accountable, need to write something down on paper – as evidence for what you are doing and why, far too much on development plan I came out of college with a set of ideals, but realise they are unrealistic, English- language, children not capable of working at level, in ----(school) pupils don't have the basics Will I have an impact? Observation by mentors, reinforces the feeling of being watched, nine over the year, it's about self evaluation, so that should be more valuable. Can I keep up this standard?	
Nature of stress Stress is feeling overburdened with tasks to complete Stress is pressure – on mental and/or physical energy Stress is something that just creeps up on you Stress is a feeling of overload, Stress is a feeling that things are getting on top of you Stress is more work not enough time Stress is all around me at work All of these things above are stressful in equal measure and the most stressful can change daily depending on new pressures and expectations Stress is a lack of support when needed Stress can be a motivator if it's not a constant existence in your job Unfortunately stress is in every job at some level Within teaching there is a high level of stress with a high level of demand of your own personal time stress is a lack of communication that in turn makes you feel incompetent Feeling like you are not coping, upset, overtired, wound up.	**Mediators** Try deep breathing Walk at night for 30 minutes Try to be as organised as I can be so that the class runs smoothly Stop feeling guilty about <u>not</u> covering everything <u>all</u> of the time Have most disturbed children removed from class Relaxing activities in my own time include crosswords, reading and television In class various calming activities for children are very helpful – talking and listening sessions are beneficial as is circle time Story telling or audio tapes are also good I try not to be in school any later than 4.15 pm, even if it means taking things home with me The work I take home is stuff that doesn't need a lot of focus/concentration to do I try not to do any school work on my non-teaching days(job-share) I will only start to look over things on a Sunday night, but **<u>never</u>** on a Saturday Go to the gym

	Talk over/ discuss/ air! Issues causing concern Send pupils to the HT or exclude them from class I run I talk about what has happened, in the staffroom Staffroom ethos, letting off steam I relieve stress by talking to my friends and partner Going to the gym or exercising Making time for relaxation or activities I go to the gym every day of my life I take lots of combat classes I enjoy a long run I find exercise and focussing on my breathing and sometimes pain! Distracts my mind completely, it helps me to switch off Believe it or not, I am not a big drinker. I don't think alcohol would let me unwind I do partake in swearing, that can be an instant relief Maintain a social life, have a moan in staffroom, try to plan lessons in the new areas especially, and be organised Yoga, taking walks

Appendix 11   stage 3 analysis   The nature of stress

Subjective	Objective
Stress is feeling overburdened with tasks to complete	Stress is pressure – on mental and/ or physical energy
Stress is something that just creeps up on you	Stress is more work, not enough time
Stress is a feeling of overload	Stress is a lack of support when needed
Stress is a feeling that things are getting on top of you	Stress can be a motivator if it's not a constant existence in your job
Stress is all around me at work	Unfortunately stress is in every job at some level
All of these things can be stressful in equal measure and the most stressful can change daily depending on new pressures and expectations	
Within teaching there is a high level of stress with a high level of demands on your own personal time	
Stress is a lack of communication that in turn makes you feel incompetent	

Words in red are examples of the release of the stress hormone cortisol that disrupts higher mental processes and make coping with everyday tasks more effortful.

Words in blue are examples of time pressures

Appendix 12   stage 3 analysis   Causes of stress

Lack of control	Workload	Discipline
Demands which are put upon you	New areas of the curriculum which take time to teach ICT, religious and moral education, environmental studies, technology	Discipline issues bring about stress too
Tasks/ meetings etc arranged with insufficient notice		Stressful experiences are related to discipline when pupils are badly behaved and they do not respond to reprimands
	There is a lot of reading to be done beforehand	
Having your given teaching time interrupted to cover classes during teacher absence		Deal with difficult behaviour
	Workload issues cause most stress	
Trying to teach without disruption		When staff do not follow what we have agreed as policy, but go off and do their own thing, especially when it is a matter of discipline
	Trying to keep up with all the new additions to the curriculum	
How to deal with social/behavioural issues, anger management, development of caring attitudes (of children)		
	Plan lessons	Trying to teach without disruption
Absences, time keeping (of children)		How to deal with social/behavioural issues, anger management, development of caring attitudes (of children)
	Report cards, parents' nights, ASPs (additional support plans)	
Coping with other staff members who are not doing their bit. In a school like mine, there are timetables for everything, people don't stick to it		
	Time spent □learning´ it myself	---------------------------
I have 31 children, some of my colleagues have 18 children, yet the allocation of time given is the same. I can find this stressful	I made a decision to go part-time – to go without money – still take things home	**Management**
	Far too much on development plan	Coping with other staff members who are not doing their bit. In a school like mine, there are timetables for everything, people don't stick to it
Some staff don't pull their weight and get away with it – e.g. sharing responsibility in working parties and report writing	Overloaded curriculum. Knowing that I am not delivering all of it effectively	
		Demands which are put upon you
	I have to meet deadlines	
I seem to do all that is asked of me while some others do nothing		
	I experience stress within my job to complete tasks within a timescale	

When staff do not follow what we have agreed as policy, but go off and do their own thing, especially when it is a matter of discipline	There is no way to complete everything that has to be done in the time allocated, under a lot of pressure to complete Some staff don't pull their weight and get away with it – e.g. sharing responsibility in working parties and report writing There is a great deal of pressure about areas of the curriculum Assess and be accountable Complete tasks within a timescale You're accountable, need to write something down on paper – as evidence for what you are doing and why	I have 31 children, some of my colleagues have 18 children, yet the allocation of time given is the same. I can find this stressful There is no way to complete everything that has to be done in the time allocated, under a lot of pressure to complete Some staff don't pull their weight and get away with it When staff do not follow what we have agreed as policy, but go off and do their own thing, especially when it is a matter of discipline I seem to do all that is asked of me while some others do nothing Within my job there is a lot of stress. I experience it when communication between management and staff deteriorate
Personal factors When reviewing a previous terms work, I feel stressed when I revised areas of the curriculum that I haven't taught well – i.e. IT Assess and be accountable Time spent "learning" it myself There is no way to complete everything that has to be done in the time allocated,	**children** Physical welfare of children and how to build on mental capabilities Relationships with children The most stressful part of my day can tend to be home time. Getting children out the door with jackets. Ensuring they are leaving with a known adult.	**Inclusion** How to help children with special needs The policy on inclusion – pupils who at one time would have been in special school – time spent planning for and teaching individual children out of proportion to that allotted to other pupils Constant interruptions from disturbed children who in turn upset the rest of the class

Complete tasks within a timescale Overloaded curriculum. Knowing that I am not delivering all of it effectively Trying to keep up with all the new additions to the curriculum I made a decision to go part-time – to go without money – still take things home You're accountable, need to write something down on paper – as evidence for what you are doing and why I came out of college with a set of ideals, but realise they are unrealistic Will I have an impact? Observation by mentors, reinforces the feeling of being watched, nine over the year, it's about self evaluation, so that should be more valuable Can I keep up this standard?	English- language, children not capable of working at level, in ----(school) pupils don't have the basics Constant interruptions from disturbed children who in turn upset the rest of the class Preparing children to receive the sacraments Trying to teach without disruption How to deal with social/behavioural issues, anger management, development of caring attitudes (of children) Absences, time keeping (of children)	Trying to teach without disruption How to deal with social/behavioural issues, anger management, development of caring attitudes (of children) **Interpersonal factors** Parents can be very rude and talk down to you. I find this stressful and unacceptable I find dealing with parents a stressful aspect of the job When staff do not follow what we have agreed as policy, but go off and do their own thing, especially when it is a matter of discipline Within my job there is a lot of stress. I experience it when communication between management and staff deteriorate Some staff don't pull their weight Coping with other staff members who are not doing their bit

Appendix 13   **stage 3 analysis**   **Outcomes of stress**

Psychological	**Psychological / physical**
You become frustrated at not being able to teach properly Worrying about delivering the curriculum properly Worry, in some cases, about homelife of children Anxiety when I am not in control of what I have to do Feeling that you can't cope and are not doing well I feel inadequate and unable to stop them answering back Inability to get job satisfaction because can't get kids to learn	Anxiety / exhaustion Depression, bad moods and anxiety Feeling inadequate and unable to cope with workload, and manage behaviour of pupils Feeling that you are not coping, upset, overtired, wound-up
Physiological / psychological	**Physiological**
Leaves you bad tempered and depressed Insomnia, lack of concentration, over thinking things Trying not to lose my temper and take my frustration out on the children	I lose my temper

Appendix 14   **analysis stage 3**   **Stress mediators**

Physical	Taking positive control
Try deep breathing	Try to be as organised as I can so that the class runs smoothly
	Stop feeling guilty about <u>not</u> covering everything <u>all</u> of the time
Walk at night for 30 minutes	Have most disturbed children removed from the class
	In class various calming activities for children are very helpful – talking and
Relaxing activities in my own time include crosswords, reading and	listening sessions are beneficial as is circle time. Story telling or audio tapes
television	are also good
	I try not to be in school any later than 4.15 pm, even if it means taking things
Go to the gym, I run	home with me
	The work I take home is stuff that doesn't need a lot of focus/ concentration
Going to the gym or exercising	to do
	I try not to do any school work on my non-teaching days
I go to the gym every day of my life, I take lots of combat classes	I will only start to look over things on a Sunday night, but <u>never</u> on a
I enjoy a long run	Saturday
I find exercise and focussing on my breathing and sometimes pain! distracts	Try to plan lessons, in the new areas especially, and be organised
my mind completely, it helps me switch off	Send pupils to the headteacher or exclude them from class
	Making time for relaxation or activities
I do partake in swearing, that can be an instant relief	The work that I take home is stuff that doesn't need a lot of focus /
	concentration to do
Yoga, taking walks	Believe it or not, I am not a big drinker. I don't think alcohol would let me
	unwind
Social	
Talk over/ discuss/ air! issues causing concern	
I talk about what has happened in the staffroom	
Staffroom ethos, letting off steam	
I relieve stress by talking to my friends and partner	
Maintain a social life, have a moan in the staffroom	

Appendix 15   CfE letter to teachers

Dear colleague,

I am a teacher in your Learning Community who is studying for a higher degree in education.

My research is an investigation of the impact of national and local policy change on teachers, and several years ago, teachers were kind enough to complete a questionnaire related to policy change since 2000.

My study is near to completion and I wish to update the data by asking your views on A Curriculum for Excellence, which had not been implemented at the start of my investigation.

I have one open-ended question to ask:

"What are your early impressions of CfE and how is it impacting on your teaching?"

A response of perhaps 1/2 page / 300 words would be adequate though longer is ok.

You may respond to this question by email, either to CMorrrison@xxxxxxxpri.xxxxx.sch.uk or cat.morrison@btinternet.com

I assure you that any information given will be completely confidential, and that no individual or establishment will be identified.

I realise that this is a very busy time for everyone and I thank you for your co-operation and assistance.

Yours sincerely

Catherine Morrison

Appendix 15a   Follow up CfE letter to headteachers

From: Catherine Morrison [cat.morrison@btinternet.com]
Sent: 22 May 2012 13:37
To: '_Headteacher (xxxxxxx Primary)'
Subject: CfE

Attachments: current letter to teachers.doc

Dear xxxxxx

At the end of last session I asked teachers in the learning community to answer one further question for me, to bring my research up to date. Unfortunately, I received a very poor response and I would like to try once more to collect some information on CfE. Would you be kind enough to pass this request to your staff? xxx did approve my request to carry out the research with the stipulation that I approach staff through the Headteachers of the schools in the Community.

Thanks

Catherine Morrison

Appendix 15b: Analysis of Curriculum for Excellence (CfE) question

A question regarding attitudes to a CfE was given to head teachers within the Glasgow teaching community with a request that the questionnaire be distributed to staff. The response rate was disappointingly low. A second request was made to head teachers and again the response was very low with only seven responses received in total.

The question asked was "What are your early impressions of CfE and how it is impacting on your teaching?"

The responses are included below.

A coding approach was used to analyse the responses and the following categories were used (Cohen et al, 2007):

Code	*Notation used within the text*
Situations	*Situation*
Perspectives held by subjects	*Perspective, perspective positive (+ve), perspective negative (-ve)*
Ways of thinking about people & objects	*Way of thinking*
Process	*Process*
Activity	*Activity*
Relationships and social structures	*Relationship*

Based on the codes and the frequency with which they appeared, five themes emerged one positive and four negative. A CfE was viewed positively because of its multi interdisciplinary approach. However the amount of planning involved, the lack of clear standards or expectations, the inconsistent approach and a failure to provide/lack of resources to support emerged as negative themes.   The quotes are copied verbatim from the emails sent.

Janet

"I think that ACE has had a <u>very positive impact on me as a teacher</u> (perspective +ve). It has <u>given me</u> (perspective +ve) the opportunity to have more ownership and freedom of choice about teaching and learning in my classroom. <u>It has completely changed</u> (perspective) teaching from when I qualified in 2004. As a probationer then, <u>I was expected to</u> (perspective) <u>stick rigidly to</u> (process) set hours and set resources for each area of the curriculum. The <u>only choice I had</u> (perspective -ve) then was <u>about the strategies I chose to teach lessons (process)</u> . The Curriculum for Excellence has <u>given me the opportunity</u> (perspective +ve) to teach lessons <u>more actively</u> (process) and to take an interdisciplinary approach. <u>I have found</u>

(perspective +ve) this to <u>be more engaging, interesting and inclusive for the children</u> <u>(process)</u> and <u>I much prefer it</u> (perspective +ve)."

Kenneth

"As a new teacher I began my training while CfE was in draft format. I have worked with CfE from this time and <u>I believe</u> (perspective +ve) in this early stage that it is an excellent curriculum for Scotland. I cannot comment on the impact this had made to my teaching in comparison to 5-14 however <u>I can say</u> (perspective +ve) the CfE had formed strong foundations on which I have developed as a young teacher. Within my experience the CfE has <u>had an impact</u> (perspective) in both my <u>planning</u> (activity) of long term and short term learning experiences and also in the <u>assessment</u> (activity) of these.

I have used the outcomes and experiences as the basis for all planned learning experiences. In particular the <u>planning</u> (activity) of interdisciplinary topics has allowed for natural links to be made across the curricular areas: creating an experience and working down to the outcomes. In this respect <u>I believe</u> (perspective +ve) that I have been continually reflecting and seeking to create an experience which is relevant and motivational to the children in my class and not one based on a universal planning document.

<u>As my experience</u> (perspective) as a teacher has grown I have however found that supplementary documents are been required to ensure sufficient the depth and progression that is called for. For example, within Mathematics/Language the outcomes provide little detail of the progression of skills which has <u>led to schools to examine</u> (activity) their own practice and thus create their own additional planning documents. Although this has been <u>ultimately of benefit</u> (perspective +ve) in each establishment I have worked, often providing others with the confidence to work within CfE, it is a <u>time consuming process</u> (perspective –ve)."

Lennon

"Advantages.

* - gives you great scope (perspective +ve) to <u>create new engaging learning</u> <u>opportunities</u> (activity) for children.*
* - allows you to <u>share practices</u> (activity) across various websites such as NAR and GLOW and Glasgow's own website.*
* <u>- if we want</u> (perspective) to have successful, confident, responsible and effective children <u>we must give them</u> (activity) challenging learning experiences. <u>CfE gives you</u> (perspective) the framework to hang these challenges on, <u>it gives you</u> (perpective) the chance to <u>design cross-curricular work</u> (activity) which can get children working together in groups and across age groups showing them the importance of working with others and committing their skills to help others.*
* - <u>linking with outside agencies</u> (activity) shows children that there are bodies outside of school that they can get involved in and how these bodies work inside their own society*

- I started teaching 5 years ago so I have reflected on and developed as CfE has, it is not new to newer teachers so does not bring up the <u>challenge of change</u> (perspective) for maybe teachers who have been involved in education for a number of years.

Disadvantages

<u>Planning</u> (activity): do I need to say more. At any level, early, first or second there is a great requirement for planning. New engaging activities need great thought before implementation so <u>this consumes many hours</u> (perspective -ve).

Assessment and moderation: every school in 32 EAs are doing different things, even schools in the same street. Does this variety enhance the learning experience? Where is the control of what the children are experiencing and with the vagueness of developing, consolidating and secure, every school could be doing the exact same thing and have the children at different levels or totally different things and have children at the same levels.

The Rant

Having come from industry <u>CfE is shambolic</u> (perspective -ve). Industries have standards which they strive for and adhere to, ensuring quality and improvement. <u>CfE is consumed with vagueness</u> (perspective -ve) which, at times, <u>ensures teachers are consumed with apathy</u> (perspective -ve). The Experiences and Outcomes are so wide ranging and indistinct it is <u>difficult to understand</u> (perspective -ve) what they want from the children. <u>One of the best ways of learning</u> (perspective) is using <u>formative assessment</u> (activity). Why did the Executive not create a whole range of WALTs and WILFs? I am sure this would have been embraced by everyone. They are sometimes difficult to create but if you want everyone working to the same standards what a good way to start it.

<u>CfE is the biggest change</u> (perspective) in Scottish Education for a long time. If you look at the following link which shows 8 ways to implement change (can be applied to education as well as industry) <u>how many can you say</u> (activity) the Executive have done.

<u>www.metricationmatters.com/docs/LeadingChangeKotter.pdf</u>

Finally, I have worked in some of the most deprived areas in Europe, inside Glasgow. The children in these areas are looking for opportunities: we are looking for excellence. It <u>should be a Curriculum for Opportunity</u> (perspective), this is want Scotland should have. The strive for excellence will allow the talent to rise to the top, which they would anyway regardless of what education system we had. Let's give all our children the skills to grab hold of the opportunities that will be out there in the future."

Moira

"I fully appreciate and <u>admire the theory behind CFE</u> (perspective +ve). I do believe that 5-14 had created some teachers who relied a bit too much on the the local authority handing them planned unit studies - unit studies which hadn't been adapted

or updated for about 10 years plus. Also, through the expansion of the curriculum by adding on things like enterprise education and ICT, health and well-being etc, lots of bits of the curriculum were being taught in isolation as discrete areas with no integration to other areas. I think a lot of spontaneity and creativity had been lost. However, despite this you will always have teachers who were willing to think outside the box and 'tweak' these 5-14 topic studies. For example the P4 social studies on disability had a place to teach children about our diverse society but the planned lessons and outcomes suggested were dire! I know for sure that the disability topic that I taught bore no resemblance to the the suggested one. <u>CFE perhaps encourages</u> (perspective +ve) teachers a bit more to bring their own knowledge and experiences to the forefront and to <u>plan programmes</u> (activity) to suit your own particular pupils' experiences and learning styles.

Two years down the line <u>I think</u> (perspective) I try to <u>deliver a more integrated approach</u> (activity) to the curriculum. The topics that I now teach try to encompass all the extra bits i.e. ICT, Enterprise rather than these being taught discretely. Equally, I don't think we should be forcing the curriculum to make tenuous links when planning for topics.

<u>I think</u> (perspective -ve) the main hindrance to the delivery of CFE has been funding. I think if classrooms and teachers had been properly resourced from the start with things like

> *ICT equipment that works and is reliable, banks of computers with high speed broad band and affordable printers.*

> *Smart boards and projectors in <u>every</u> classroom, how can school get by on 2 projectors for smart boards as we currently are!*

> *Budget for the basics - up to date soft ware, educational games, photocopying and laminating budgets, etc.*

If this had been in place teachers <u>would have had the confidence</u> (perspective -ve) and the tools to proceed with creating new and exciting programmes of study.

When you think back to the extra in-service days that were allocated for CFE, they really were of <u>no significant value</u> (perspective -ve). We sat and listened to the theory, studied those ridiculous gigantic outcomes posters, really the time and money <u>would have been better spent</u> (perspective -ve) putting us into teams in order to <u>brainstorm and plan</u> (activity) good quality integrated topics or even ideas for topics. Instead last year we were faced with a <u>feeling of panic for planning</u> (perspective -ve) from scratch, this year, <u>we have had the difficulty of</u> (perspective -ve) some HT who are unwilling to give up the pre existing topics and planning formats which in effect <u>creates double the work</u> (perspective -ve) because most staff have been eager to <u>plan</u> (perspective -ve) new ways but still having to hand in the usual requirements!

Also, the delivery of innovative methodology and practices e.g. Active learning, big writing, positive futures etc. the momentum must be kept up for these. For example, 'BIG WRITING' a 1 ½ hour input at a wed staff meeting is not enough to implement such a big change in how you would teach writing, you need the teacher books,

classroom resources to back these initiatives up. All these things are being rolled out in order to back up CFE but there <u>needs proper funding</u> (perspective -ve) and delivery of it to succeed. Throughout the years there has always been a big push on new ideas/concepts but then put on the back burner.

Finally, as a parent as well as a teacher, <u>I kind of get the impression</u> (perspective) that parents are <u>losing a bit of confidence</u> (perspective -ve) with this. Especially as a parent of a child ready to enter secondary education. Also, as a parent of a child in the nursery sector where as far as I can see they really are on top of it, therefore there is <u>too much inconsistency</u> (perspective -ve) across nursery, primary and secondary which CFE encompasses."

Nancy

From reading the curriculum for excellence document it boasts that children:

"Curriculum for Excellence aims to achieve a transformation in education in Scotland by providing a coherent, more flexible and enriched curriculum from 3 to 18. The curriculum includes the totality of experiences which are planned for children and young people through their education, wherever they are being educated." (LTS website - what is curriculum for excellence)

<u>I believe that</u> (perspective -ve) at present my experience of the introduction of ACE is that it is not that flexible. This may be due to the transition from 5 -14 to ACE. However, as a practitioner <u>there seems to be a lot of extra planning</u> (perspective –ve) as <u>I am planning</u> (activity) an integrated topic <u>as well as planning</u> (activity) for all the curricular areas, which <u>I feel defeats</u> (perspective -ve) the purpose. Furthermore, <u>the implementation of ACE I feel was rushed</u> (perspective –ve), as <u>no assessment or planners</u> (activity) for teacher to work on had been devised. <u>In my opinion</u> (perspective –ve), teachers have been left to collaborate together to <u>implement and devise</u> (activity) assessment and plans of work. <u>The concern is that</u> (perspective -ve) this will not be universal across even a learning community. Does that mean that <u>standards</u> (process) across councils will be poles apart.

The four capacities of ACE; Successful Learner, Responsible Citizen, Effective Contributor and Confident Individuals <u>I believe</u> (perspective) can be achieved if within your classroom their are children eager to learn. As a practitioner <u>all I can do</u> (perspective) is <u>prepare</u> (activity) quality learning experiences with well planned and well resourced lessons.

<u>I do believe that</u> (perspective +ve) ACE has a lot to offer as it matures as learning should provide the learner real experiences. <u>I envisage that</u> (perspective) as teachers share resources and begin to have a bank of planners and assessments ACE has the <u>capacity to give teachers more freedom</u> (perspective +ve), to <u>allow more interdisciplinary teachings</u> (perspective +ve) (not over-planning) We as teachers want to capture learners with experiences in the classroom that they can relate to and see as relevant. ACE is recognising that the skills we need to teach children should be skills that will help our learners for work. To have children switched onto learning to enhance life-long learning and a fruitful work-life."

olivia

"The Curriculum for Excellence has <u>given our school the opportunity</u> (perspective +ve) to provide the children with a relevant programme that gives the staff the space to meet the various needs of the children in our school. In our school the experiences and outcomes are <u>carefully planned</u> (activity) are included in the ethos and life of the school and interdisciplinary studies as well as learning within the curriculum areas and subjects. This means that they apply beyond timetabled classes and into, for example, enterprise and health activities and special events. All staff members are clear of the responsibility of Health and Well Being across learning which promotes confidence, independent thinking and positive attitudes and dispositions.

The Cfe has been <u>inspirational</u> (perspective +ve) in changing how <u>we plan</u> (activity) the children's <u>learning</u> (process). Through using <u>Personal Learning Plans</u> (process) the children also play an integral role in <u>planning</u> (activity) their learning. We have am clear curriculum plan in place but this can also be <u>adapted to meet the needs</u> (process) of the children at that given time e.g. Within our local community there were serious issues with local gangs and as a <u>staff agreed</u> (activity) we would address this problem with a whole school topic. Each class <u>planned</u> (activity)what they were going to learn and how they <u>were going to learn</u> (process) it. The programme ended with every class <u>displaying their knowledge</u> (activity) to specially invited guests.

In XXXXXXXXXXXX Primary <u>we appreciate</u> (perspective) the importance of partnership working and value their specialist expertise and knowledge and ensure through <u>careful planning</u> (activity) and <u>briefing</u> (activity) that all contributions come together in ways which achieve coherence and progression. We have an extensive list of partners that we work alongside which contributed to our Platinum Award in Enterprise and Glasgow Effective Partnership Award.

In our school the staff <u>have a shared vision</u> (perspective) and common goal and thrives to provide the <u>best education</u> (process) for the children in which they can reach their full potential. This <u>is achieved</u> (activity) by giving the children various opportunities. Here a some examples.

- *Whole school councils (Every child in the school is involved in a council, which consists of children form P1 to P7*
- *Whole school Life skills Goldentime*
- *P.A.C time. The children are giving the opportunity to plan what they would like to learn*
- *Interdisciplinary Learning across stages*
- *After school clubs e.g. Dance and Football*
- *Lunchtime clubs e.g. Sports*
- *Breakfast clubs   e.g. Football*
- *Families Partnership Programme*
- *Award winning school choir*
- *Active Parent Council*
- *Streets Ahead Project (Working with the Children's Parliament*
- *F.A.R.E and G.E A P*

- *Clyde in the classroom*
- *An extensive range of sporting activities and events"*

Peter

"Early impressions (perspective)are same as at the very start. Very Good/Excellent idea (perspective positive) poorly funded (perspective negative) and poorly planned (perspective negative)in its implementation.

Teachers are told they are "Free" to develop as they see fit without any additional (perspective negative) free time or money or adequate resources to do so.

It is therefore being executed under duress/pressure (perspective negative) and is bound to suffer as a consequence.

Other major developments involved practical help through SQA and Learning Teaching Scotland seems to be struggling (perspective negative)to keep up.

It would be helpful (perspective) if we could see the "end game" and know where we are trying to get to. Many support resources were available for Standard Grade and latterly for Higher Still.

Our department have been involved in many exciting new lessons/activities (perspective positive)to do with CfE but I personally am unimpressed (perspective negative) with the support given out with Departmental professionalism."

Appendix 15c   Analysis categories for CfE   stage 1

Perspective	Situations	Process
Ace has had a very positive impact on me as a teacher It has given me more ownership and freedom of choice about teaching and learning in my classroom. It has completely changed teaching from when I qualified in 2004 As a probationer I was expected to stick rigidly to set hours and set resources for each are of the curriculum. The only choice I had then was about the strategies I chose to teach lessons The CfE has given me the opportunity to teach lessons more actively and to take a interdisciplinary approach I have found this to be more engaging, interesting and inclusive for the children and I much prefer it. I believe that in this early stage that it is an excellent curriculum for Scotland I can say the CfE had formed strong foundations on which I have developed as a young teacher. Although this has been ultimately of benefit in each establishment I have worked, often providing others with the confidence to work within CfE, it is a time consuming process Does this variety enhance the learning experience? Where is the control of what the children are	It has completely changed teaching from when I qualified in 2004 As a probationer I was expected to stick rigidly to set hours and set resources for each are of the curriculum. The only choice I had then was about the strategies I chose to teach lessons I believe that in this early stage that it is an excellent curriculum for Scotland As my experience (perspective) as a teacher has grown I have however found that supplementary documents are been required to ensure sufficient the depth and progression that is called for. I started teaching 5 years ago so I have reflected on and developed as CfE has it is not new to newer teachers so does not bring up the challenge of change (perspective) for maybe teachers who have been involved in education for a number of years. Having come from industry CfE is shambolic (perspective -ve). Industries have standards which they strive for and adhere to, ensuring quality and improvement Finally, I have worked in some of the most deprived	As a probationer I was expected to stick rigidly to set hours and set resources for each are of the curriculum. The only choice I had then was about the strategies I chose to teach lessons I have found this to be more engaging, interesting and inclusive for the children and I much prefer it. I have used the outcomes and experiences as the basis for all planned learning experiences. In particular the planning of interdisciplinary topics has allowed for natural links to be made across the curricular areas: creating an experience and working down to the outcomes. I believe (perspective +ve) that I have been continually reflecting and seeking to create an experience which is relevant and motivational to the children in my class and not one based on a universal planning document. If this had been in place teachers would have had the confidence and the tools to proceed with creating new and exciting programmes of study. We sat and listened to the theory, studied those ridiculous gigantic outcomes posters, really the time and money would have been better spent (perspective -ve) putting us into teams in order to brainstorm and plan (activity) good quality integrated topics or even

experiencing and with the vagueness of developing, consolidating and secure, every school could be doing the exact same thing and have the children at different levels or totally different things and have children at the same levels.

CfE is consumed with vagueness which, at times, ensures teachers are consumed with apathy

The Experiences and Outcomes are so wide ranging and indistinct it is difficult to understand what they want from the children.

It should be a Curriculum for Opportunity this is want Scotland should have.

The strive for excellence will allow the talent to rise to the top, which they would anyway regardless of what education system we had. Let's give all our children the skills to grab hold of the opportunities that will be out there in the future."

I fully appreciate and admire the theory behind CFE

CFE perhaps encourages teachers a bit more to bring their own knowledge and experiences to the forefront

I think the main hindrance to the delivery of CFE has been funding. I think if classrooms and teachers had been properly resourced from the start with things like

Finally, as a parent as well as a teacher, I kind of get the impression (perspective) that parents are losing a bit of

areas in Europe, inside Glasgow. The children in these areas are looking for opportunities: we are looking for excellence.

I do believe that 5-14 had created some teachers who relied a bit too much on the local authority handing them planned unit studies - unit studies which hadn't been adapted or updated for about 10 years plus.

Two years down the line I think (perspective) I try to deliver a more integrated approach (activity) to the curriculum.

When you think back to the extra in-service days that were allocated for CFE, they really were of no significant value (perspective -ve).

Instead last year we were faced with a feeling of panic for planning (perspective -ve) from scratch, this year, we have had the difficulty of (perspective -ve) some HT who are unwilling to give up the pre existing topics and planning formats which in effect creates double the work (perspective -ve

in the nursery sector where as far as I can see they really are on top of it, therefore there is too much inconsistency (perspective -ve) across nursery, primary and secondary which CFE encompasses."

I believe that (perspective -ve) at present my experience of the introduction of ACE is that it is not that flexible. This may be due to the transition from 5 -14 to ACE.

ideas for topics.

'BIG WRITING' a 1 ½ hour input at a wed staff meeting is not enough to implement such a big change in how you would teach writing, you need the teacher books, classroom resources to back these initiatives up.

All these things are being rolled out in order to back up CFE but there needs proper funding (perspective -ve) and delivery of it to succeed. Throughout the years there has always been a big push on new ideas/concepts but then put on the back burner.

We as teachers want to capture learners with experiences in the classroom that they can relate to and see as relevant. ACE is recognising that the skills we need to teach children should be skills that will help our learners for work. To have children switched onto learning to enhance life-long learning and a fruitful work-life."

Teachers are told they are "Free" to develop as they see fit without any additional (perspective negative) free time or money or adequate resources to do so.
It is therefore being executed under duress/pressure (perspective negative) and is bound to suffer as a consequence.

Other major developments involved practical help through SQA and Learning Teaching Scotland seems to be struggling (perspective negative) to keep up.
It would be helpful (perspective) if we could see the

confidence (perspective -ve) with this. Furthermore, the implementation of ACE I feel was rushed as no assessment or planners (activity) for teacher to work on had been devised. The four capacities of ACE; Successful Learner, Responsible Citizen, Effective Contributor and Confident Individuals I believe can be achieved if within your classroom their are children eager to learn. I do believe that ACE has a lot to offer as it matures as learning should provide the learner real experiences. . I envisage that as teachers share resources and begin to have a bank of planners and assessments ACE has the capacity to give teachers more freedom, to allow more interdisciplinary teachings (not over-planning) The Curriculum for Excellence has given our school the opportunity (perspective +ve) to provide the children with a relevant programme that gives the staff the space to meet the various needs of the children in our school. The Cfe has been inspirational in changing how we plan (activity) the children's learning (process) Early impressions are same as at the very start. Very Good/Excellent idea poorly funded and poorly planned in its implementation. Our department have been involved in many exciting new lessons/activities (perspective positive) to do with CfE but I personally am unimpressed (perspective negative) with the support given out with Departmental		"end game" and know where we are trying to get to. Many support resources were available for Standard Grade and latterly for Higher Still.

professionalism."		
Activity

Within my experience the CfE has had an impact in both my planning of long term and short term learning experiences and also in the assessment of these.

within Mathematics/Language the outcomes provide little detail of the progression of skills which has led to schools to examine their own practice and thus create their own additional planning documents

gives you great scope (perspective +ve) to create new engaging learning opportunities for children.
  - allows you to share practices across various websites such as NAR and GLOW and xxxxx own website.
  - if we want (perspective) to have successful, confident, responsible and effective children we must give them challenging learning experiences. CfE gives you (perspective) the framework to hang these challenges on, it gives you (perpective) the chance to design cross-curricular work

linking with outside agencies

I started teaching 5 years ago so I have reflected on and developed as CfE has

Planning : do I need to say more. At any level, early, first or second there is a great requirement for planning. New engaging activities need great thought before implementation so this consumes many hours (perspective -ve). | **Relationship and social structures**

which can get children working together in groups and across age groups showing them the importance of working with others and committing their skills to help others.

linking with outside agencies shows children that there are bodies outside of school that they can get involved in and how these bodies work inside their own society

 In my opinion (perspective –ve), teachers have been left to collaborate together to implement and devise (activity) assessment and plans of work. The concern is that (perspective -ve) this will not be universal across even a learning community. Does
that mean that standards (process) across councils will be poles apart.

In our school the experiences and outcomes are carefully planned (activity) are included in the ethos and life of the school and interdisciplinary studies as well as learning within the curriculum areas and subjects. This means that they apply beyond timetabled classes and into, for example, enterprise and health activities and special events. All staff members are clear of the responsibility of Health and Well Being across learning which promotes confidence, independent thinking and positive attitudes and dispositions.

Through using Personal Learning Plans (process) the children also play an integral role in planning (activity) | |

340

Assessment and moderation: every school in 32 EAs are doing different things, even schools in the same street. One of the best ways of learning (perspective) is using formative assessment. Why did the Executive not create a whole range of WALTs and WILFs? I am sure this would have been embraced by everyone. They are sometimes difficult to create but if you want everyone working to the same standards what a good way to start it. Also, through the expansion of the curriculum by adding on things like enterprise education and ICT, health and well-being etc, lots of bits of the curriculum were being taught in isolation as discrete areas with no integration to other areas. I think a lot of spontaneity and creativity had been lost. However, despite this you will always have teachers who were willing to think outside the box and 'tweak' these 5-14 topic studies. For example the P4 social studies on disability had a place to teach children about our diverse society but the planned lessons and outcomes suggested were dire! I know for sure that the disability topic that I taught bore no resemblance to the suggested one. and to plan programmes to suit your own particular pupils' experiences and learning styles. The topics that I now teach try to encompass all the extra bits i.e. ICT, Enterprise rather than these being taught discretely. Equally, I don't think we should be forcing the curriculum to make tenuous links when planning for topics.	their learning. we appreciate (perspective) the importance of partnership working and value their specialist expertise and knowledge and ensure through careful planning (activity) and briefing (activity) that all contributions come together in ways which achieve coherence and progression. We have an extensive list of partners that we work alongside In our school the staff have a shared vision (perspective) and common goal and thrives to provide the best education (process) for the children in which they can reach their full potential. This is achieved (activity) by giving the children various opportunities.	

because most staff have been eager to plan (perspective -ve) new ways but still having to hand in the usual requirements!

Also, the delivery of innovative methodology and practices e.g. Active learning, big writing, positive futures etc. the momentum must be kept up for these.

However, as a practitioner there seems to be a lot of extra planning (perspective –ve) as I am planning an integrated topic as well as planning for all the curricular areas, which I feel defeats (perspective -ve) the purpose.

As a practitioner all I can do (perspective) is prepare quality learning experiences with well planned and well resourced lessons.

Within our local community there were serious issues with local gangs and as a staff agreed we would address this problem with a whole school topic. Each class planned what they were going to learn and how they were going to learn (process) it. The programme ended with every class displaying their knowledge to specially invited guests.

Appendix 15d   **stage 2 analysis CfE Themes within initial codes**   **black = positive ; blue = negative response**

Perspectives	Control over curriculum	Active teaching and learning
ACE has had a very positive impact on me as a teacher I much prefer it (active teaching) I believe (CfE) is an excellent curriculum for Scotland It is not new to newer teachers, so does not bring up the challenges of change for maybe teachers who have been involved in education for a number of years I fully appreciate and admire the theory behind CfE. I do believe that ACE has a lot to offer as it matures as learning should provide the learner with real experiences Having come from industry CfE is shambolic As a parent as well as a teacher, I kind of get the impression that that parents are losing confidence with this ...as a parent with a child in the nursery sector where as far as I can see they really are on top of it, therefore there is too much inconsistence across nursery, primary and secondary which CfE	I have more ownership and freedom of choice about teaching and learning in my classroom CfE gives you the chance to design cross-curricular work I know for sure the disability topic I taught bore no resemblance to the suggested one. CfE perhaps encourages teachers a bit more to bring their own knowledge and experiences to the forefront and to plan programmes to suit your own particular pupils' experiences and learning styles. The topics I now teach try to encompass all the extra bits i.e. ICT, Enterprise rather than these being taught discretely. I envisage that as teachers share resources and begin to have a bank of planners and assessments ACE has the capacity to give teachers more freedom to allow more interdisciplinary teaching (not over planning)	It has given me the opportunity to teach lessons more actively and to take a multidisciplinary approach

encompasses		
Effect on pupils I have found it (active learning) to be more engaging, interesting and inclusive for t he children (interdisciplinary planning) In this respect I believe that I have been continually reflecting and seeking to create an experience which is relevant to and motivational to the children Gives you great scope to create new and engaging learning opportunities for children If we want to have successful, confident, responsible and effective children we must give them challenging learning experiences. CfE gives you the framework to hang these challenges on, work which can get children working together in groups and across age groups showing them the importance of working with others and committing their skills to help others linking with other agencies shows children that there are bodies outside of school that they can get involved in and how these bodies work inside their own society	**Planning process** CfE has had an impact in both my planning of long term and short term learning experiences and also in the assessment of these Planning of interdisciplinary topics has allowed for natural links to be made across the curricular areas (lack of detail) has led schools to examine their own practice and thus create their own additional planning documents Two years down the line I think I try to deliver a more integrated approach to the curriculum. CfE has been inspirational in changing how we plan the children's learning experiences Planning: need I say more. At any level, early, first or second there is a great requirement for planning	**Additional resources** As my experience as a teacher has grown I have found that supplementary documents are required to ensure the sufficient depth and progression that is called for Allows you to share practices across various websites such as NAR I think the main hindrance to the delivery of CfE has been funding. I think that if classrooms and teachers had been properly resourced from the start with things like, …(a long list mostly technology). If this had been in place teachers would have had the confidence and the tools to proceed with creating new and exciting programmes of study. You need the teacher books, classroom resources to back these initiatives up. All these things are being rolled out in order to back up CfE but there needs proper funding and delivery of it to succeed. Early impressions of CfE are the same as at the start. Very good idea poorly funded and poorly planned in it implementation

		Teachers are told they are "free" to develop as they see fit without any additional free time or money or adequate resources to do so.
ACE is recognising that the skills we need to teach children should be skills that will help our learners work. To have children switched onto learning to enhance life-long learning and a fruitful work-life. CfE has given our school the opportunity to provide the children with a relevant programme that gives the staff the space to meet the various needs of the children in our school. the experiences and outcomes are so wide ranging and indistinct it is difficult to understand what they want from the children. I have worked in some of the most deprived areas in Europe, here in my present school. The children in these areas are looking for opportunities: we are looking for excellence. It should be a Curriculum for Opportunity; this is what Scotland should have. The strive for excellence will allow the talent to rise to the top, which they would do anyway regardless of what education system we had. Let's give all our children the skills to grab hold of the opportunities that will be out there in the future. The four capacities of ACE can be achieved if within your classroom you there are children eager to learn. As a practitioner all I can do is prepare		

quality learning experiences with well planned and well resourced lessons It is being executed under duress/pressure and is bound to suffer as a consequence		
Time Although (creating planning documents in maths/language) has been ultimately of benefit in each establishment I have worked, often providing others with the confidence to work within CfE, it is a time consuming process New engaging activities need great thought before implementation so this consumes many hours	**Deficiencies** Within mathematics/language the outcomes provide little detail of the progression of skills Industries have standards which they strive to adhere to, ensuring quality and improvement. CfE is consumed with vagueness which at times ensures teachers are consumed with apathy. I believe that at present my experience of the introduction of ACE is that it is not that flexible. This may be due to the transition from 5 -14 to ACE Other major development involved practical help through SQA, Learning Teaching Scotland seems to be struggling to keep up It would be very helpful if we could see the "end-game" and know where we are trying to get to. Many support resources were available for Standard Grade and latterly for Higher Still	**Assessment** Through personal learning plans the children play an integral role in planning their learning. One of the best ways of learning is formative assessment. Why did the Executive not create a whole range of WALTs and WILFs? I am sure this would have been embraced by everyone. They are sometimes difficult to create but if you want everyone working to the same standards what a good way to start it.
CPD When you think back to the extra in-service days that were allocated for CfE, they were really of no	**Management issues** Really the time (for CPD) and money would have been better spent on putting us together into teams	**Workload** Also the delivery of innovative methodology and practices e.g. Active learning, big writing positive

significant value. We sat and listened to the theory, studied those ridiculous gigantic outcomes posters For example "BIG WRITING" a 1 ½ hour input at a Wed staff meeting is not enough to implement such a big change in how you would teach writing	in order to brainstorm and plan good quality integrated topics or even ideas for topics. Last year we were faced with the panic of planning from scratch, this year, we have had the difficulty of some HTs who are unwilling to give up the pre existing topics and planning formats which in effect creates double the work because most staff have been eager to plan new ways but still having to hand in the usual requirements. Throughout the years there has always been a big push on new ideas/concepts but then put on the back burner. Our department has been involved in many exciting new lessons /activities to do with CfE but I personally am unimpressed with the support given out with Departmental professionalism	futures. The momentum must be kept up for these As a practitioner there seems to be a lot of extra planning as I am planning an integrated topic as well as planning for all the curricular areas which I feel defeats the purpose .
Consistency across councils Every school in 32 EAs are doing different things, even schools in the same street. Does this variety enhance the learning experience? Where is he control of what the children are experiencing and with the vagueness of developing, consolidating and secure, every school could be doing the exact same thing and have the children at different levels or totally different things and have children at the same levels The implementation of ACE I feel was rushed as no assessment or planners for teacher to work on		

had been devised. In my opinion teachers have been left to collaborate together to implement and devise assessment and plans of work. The concern is that this will not be universal across even a learning community. Does that mean that standards across councils will be poles apart		

Appendix 16   Reasons for choosing the route to management

Status/ having an input in whole school issues	Miscellaneous	I have leadership qualities.
I'm interested in having an input, more interested in curriculum development within whole school I'd like to have more input and focus for whole school issues I would like the opportunity to bring about change To make a difference I would enjoy creating/ managing my own dept/faculty where I can put into place a variety of different initiatives To gain a sense of achievement in my career Ultimate goal to be depute head	Financial benefits Eventually Too much work for CT qualification and without qualification you have as much chance as anyone else to move into management	I feel I could lead development and ethos, more of a challenge I feel I am skilled in that area Wish to change practice and lead others Had management post in previous employment and enjoy the functions of management Ambition, drive, feel I have the ability to lead
Already in promoted post No response- but already a PT Enjoy my current job as PT Already depute head Already PT head of department		**Why I don't want CT** Less of a financial commitment than CT I already have an M.Ed and not prepared for CT I'd like to go down management route due to financial outlay for CT

Appendix 17   **Reasons for choosing the route to Chartered Teacher**

Remain in class	Career development
I wish to continue class contact At the moment I prefer class contact on a regular basis Held management post in previous employment, left to work with children Enjoy hands on working with children	Initially, as there are less promotional prospects in management and just now I prefer to remain in class Think it would be a great asset in helping me develop my career Help me get a post in management at a later stage

Appendix 18   **Reasons for saying no to both management and CT**

Finance	Family	Need perm job	Workload	Other
Involves too much of a financial struggle	Family commitments (2)	My priority is to get a full time permanent job	Study deters me from that	Ex PT on conserved salary – disillusioned
Content as a teacher. Prefer to avoid the stress of interviews and the cost of CT	Health/ family commitments	Need to secure a permanent post first	Too much work for CT	Stay in class teaching
Finance attached to CT	**Retirement**		Not interested in the admin side of teaching; not prepared to put in the hours required to achieve CT	Want to teach not manage and focus 1000% on job I do now
Financial	Hope to retire in 5 years		Overloaded curriculum so not enough time to devote to doing my job properly CT would dilute this further and bring extra responsibilities and I do not feel the profession needs it	Currently PT don't want to pursue career further as it would mean less class contact
Already have an M.Ed not prepared to pay for CT	Too close to retirement			Not interested in following that route
Already have a masters degree, not willing to pay for another one			Too much to do already	Want to do job I studied for
CT too much of a financial commitment			Lack of time	Happy as PT and do not wish any further responsibility at present
Happy at present position: no promotional prospects within cluster support; will not pay for CT route			As a probationer I think about how I'll get through the day not CT etc	

Appendix 19   Reasons for wishing early retirement

Health	Factors of the job
Feeling tired and jaded For possible health reasons and if there is a package Job's not getting any easier Teaching in my school and probably in general is much more stressful and less rewarding than it used to be	This is not the job it was when I began to teach in 1974. there is too much emphasis on the disorderly sector of pupils Discipline deterioration; workload; overloaded curriculum; too many new initiatives introduced without proper consultation or training inclusion, curriculum overload, accountability to too many agencies who have very limited knowledge and interest in the overall issues which affect teaching
Lack of opportunities for career development	Changes in society
Yes only if a financial package suits. Opportunities are no longer there for people 45 – 55 yrs although these are the most experienced people in the schools	Pace at which society is changing; ICT, drugs, breakdown of family, neglected children, undisciplined chidren, lack of firm guidelines to deal with these issues,

Appendix 20   **CPD activities reported in the questionnaire**

Reading for new initiatives	National and local priorities	ICT	Needs of children	Class needs
11111, 11111, 11111, 11111, 11111, 11111 Management related reading Examining new materials	11111, 11 Formative assessment French Enterprise Formative assessment 111 Italian training 11111, 1 National assessment 11	11111, 11111, 11111, 11111, 11 Whiteboard 11 PCs Web 11 Edict modules (28hrs) Scanners & digital camera Powerpoint 11	11111, 11	Language activities Phonics Writing Early years strategies 1 Schemes of work1 Science Maths 11 Curricular development 1111 Problem solving 11 Probationer inservice Making material to support curr 11111, 1
Twilight /weekend courses 11111 Project leadership Post grad cert in PE PGCE in Health Ed, ICT 11 RE PGCE in French 1111 Weekend conferences PGCE computing	Working party 11111, 1111	Extra curricular Football 11 debate team	Course development 11111, 1111	No details 11
No to more than 35 hrs 11111, 1	Degree course 11111, 1	Number reporting stress at Level: 2, 11111,11111, 11111, 11 3, 11111,11111, 11111, 11 4, 11111, 111	Research on curriculum 1111 Research for input into staff presentations 11	Personal needs 111
Preparation/ correction 1	Consultation with stage partner 11	Meetings / committees 1111	Observation in other classrooms 1	Management related 11111

Appendix 21   **Variables with missing data**

11.1   51 responses; 11.2   54 responses; 11.5   50 responses; 11.6   48 responses; 11.7   53 responses; 11.8   52 responses

11.9   50 responses; 11.10 50 responses; 11.11 49 responses; 11.12 43 responses ; 11.13 50 responses ; 11.14 51 responses

11.15 50 responses ; 11.16 53 responses; 11.17 54 responses